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HIGHLIGHTS OF THE BIO-FOOD INDUSTRY 1990 EDITION

Québec

HIGHLIGHTS
OF THE BIO-FOOD INDUSTRY

Direction de l'économie
Ministère de l'Agriculture, des Pêcheries et
de l'Alimentation du Québec

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In this document, the masculine gender also indicates the feminine.

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PREFACE

The bio-food industry is one of constant evolution and its importance to Quebec's economy requires a comprehensive knowledge of its various sectors of activity.

Highlights of the Bio-food Industry in Québec *is the solution to needs expressed so often. This latest edition comprises four chapters and updates statistics to 1989. Chapter one presents an economic profile of the bio-food industry, dealing with overall economic performances, the food and beverage sector and international trade. The remaining chapters deal respectively with livestock productions, crop production and fisheries. Each one of the primary sectors is described in terms of production, market and economic conditions. These analyses are accompanied by a table of statistics showing the progress of principal economic indicators over the last few years, for a general view of performances in each sector.*

We are convinced that this document will prove a useful tool to all service-providers in the bio-food industry.

Associate Minister of
Agriculture, Fisheries and Food

Robert Middlemiss

Robert Middlemiss

Minister of Agriculture,
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Michel Pagé

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CHAPTER 1
ECONOMIC PROFILE

ECONOMIC PERFORMANCES OF THE BIO-FOOD SECTOR

Demand for agricultural and food products totalled an estimated $16.22 billion in 1989, up 3.4% compared to the previous year. This demand has three main sources: household demands among food retailers, consumer spending in the restaurant industry and sales on the export market. Consumer purchases in retail establishments totalled $10.85 billion, up 0.9% over 1988, while receipts in the restaurant industry settled at $4.24 billion reflecting a 12.7% increase. Finally, exports of agricultural, marine and food products totalled $1.13 billion, down 4.2% compared to 1988.

The value of retail sales of food products, in constant dollars, fell 2.4% in 1989. This drop in real demand among retailers indicates that consumers modified their food habits in favour of less expensive food or products with a lower added value. A major increase in expenses in the restaurant sector was noted, attributed to a 7.2% increase in the price of meals, more meals and a greater portion of the budget consumers allow for restaurant expenses. The number of jobs in this sector in 1989 grew 5.4%.

For this reason, large Québec distributors had to adjust some of their strategies. The takeover of **Steinberg** by **Corporation d'acquisition Socanav-caisse Inc.** and major rationalization programs by **Provigo, Métro-Richelieu** and **Steinberg** were the main factors affecting food distribution in Québec. These companies implemented tighter management of their wholesale and retail activities, by introducing, among other things, shelf space management designed to optimize the profits of foodstuffs sold in their supermarkets, by outfitting stores with optical character readers and by mechanizing more operations. These changes have increased worker productivity and consequently decreased the number of jobs available and hourly employee wages.

The value of manufacturers' shipments by processing companies in the food and beverage sector totalled 10.83 billion in 1989, down 1.6% from the preceding year. The selling price index for food and beverages in Canada however was up 2.8% over 1988. In comparing the value of shipments and the selling price of food and beverages, there is a noticeable slow of economic activity in this industry in Québec. However, it showed a good deal of strength when interest rates were high, since capital expenditures were up 2.2% in 1989, compared to the previous year.

In Québec, the value of marketed agricultural production peaked at 3.7 billion in 1989 and the value of catches in the maritime fisheries sector totalled 82.5 million. These two activities provided employment for 74 495 people. In 1989, capital expenditures in agriculture and fisheries settled at 566.5 million, a 20.2% increase over 1986, compared to Ontario who registered only an 11.8% increase. A 13.7% increase in cash receipts from 1986 through 1989 accounted for the exceptionally good performance in Québec's farm sector, attributed mainly to agricultural goods subject to quotas such as milk, chicken, turkey and eggs. The supply management system allows agricultural goods to be indexed in proportion to the cost of production, which contributes to maintaining a healthy investment climate.

In conclusion, the bio-food sector employed 353 195 people in 1989, 11.7% of total jobs in Québec.

ECONOMIC PERFORMANCES OF THE BIO-FOOD SECTOR

STATISTICS	1986	1987	1988	1989	1989/1988 - % -
TERTIARY SECTOR					
Consommer price index - Montréal					
All items	134.4	140.4	145.8	152.3	4.5
Food	128.4	135.1	139.0	144.9	4.2
Food purchased	128.1	134.8	138.0	142.7	3.4
Restaurant meals	129.2	135.9	142.4	152.6	7.2
Demand for farm and food products ($'000 000)					
Retail sales, food products	9 506.8	10 311.7	10 750.4	10 851.9	0.9
Receipts restaurants and other establishments	3 120.3	3 419.0	3 760.0	4 235.7	12.7
Exports of farm, fisheries and food product	1 300.2	1 257.5	1 182.7	1 132.7	-4.2
Total	13 927.3	14 988.2	15 693.1	16 220.3	3.4
Capital expenditures ($'000 000)					
Food stores	16.1	31.5	26.1	18.3	-29.9
Lodging and restaurants	100.7	114.8	197.1	169.2	-14.2
Employment ('000)					
Retail trade (food)	70.5	78.3	78.3	70.9	-9.5
Wholesale trade (food)	17.8	21.0	24.4	25.6	4.9
Restaurants, caterers and taverns	107.8	126.0	120.5	127.0	5.4
Average hourly earnings (including overtime)					
Retail trade	7.84	8.20	8.33	8.02	-3.7
Wholesale trade	9.94	10.19	10.34	10.47	1.3
Restaurants, caterers and taverns	5.05	5.31	5.62	5.92	5.3
SECONDARY SECTOR					
Food and beverage industries - value of shipments manufacturing ($'000 000)	10 166.4	10 476.9	11 011.7	10 833.1	-1.6
Capital expenditures ($'000 000)	202.3	253.1	328.6	335.8	2.2
Employment ('000)	50.4	56.5	56.9	55.2	-3.0
Average hourly earnings (including overtime)	11.40	11.65	12.11	12.48	3.1
PRIMARY SECTOR					
Cash receipts from farm operations ($'000 000)	3 254.9	3 255.7	3 495.0	3 701.9	5.9
Sea fisheries - value of catches ($'000 000)	85.9	126.2	99.2	82.5	-16.8
Capital expenditures - agriculture and fisheries ($'000 000)	471.4	577.7	525.2	566.5	7.9
Employment					
Agriculture	79 400	74 200	68 700	68 500	-0.3
Fisheries	6 329	6 815	6 548	5 995	-8.4
Others indicators					
Total employment - Québec ('000)	2 825.0	2 918.0	3 001.0	3 031.0	1.0
Discount rate (%)	9.2	8.4	9.7	12.3	26.8
Exchange rate (US)	0.72	0.75	0.81	0.84	3.7

Sources: 13, 50, 52, 63, 65, 66, 77, 80.

FOOD AND BEVERAGES

IMPORTANCE AND OVERALL PROFILE

In Québec, the food processing and beverage sector comprises almost 1 000 industrial establishments and many small-scale productions. The sector provides some 60 000 permanent jobs. The sectors of wholesale and retail distribution and in hotels, restaurants and institutions include more than 25 000 establishments and require the services of more than 200 000 persons.

These industries are directly related to consumer demand in Québec but they are also beginning to spill over into foreign markets. Food accounts for more than 15% of the family budget and increases to almost 20% including beverages. Activities related to this demand, that is, wholesale and retail distribution, processing and food production, are among the largest sectors of activity in each of the primary, secondary and tertiary industries in the economy.

MARKET

In 1989, retail food sales were well over $10.8 billion, up 1.0% over 1988. In the restaurant industry, receipts totalled $4.2 billion, a 12.6% increase. It is therefore an internal market worth over $15 billion each year. Statistics available also indicate that annual Québec agri-food exports were approximately $1.2 billion over the last several years.

Over the same year, Québec food and beverage shipments totalled $10.8 billion, a drop of 2.2%. On the basis of these shipments, Québec's food and beverage industry accounts for approximately 26% of the Canadian industry. The meat processing industry, dairy and animal feed industry are the nucleus and represent more than two thirds of activity in the food industry and approximately 60% in the food and beverage industry combined. The bakery industry is another large group, whose size is obvious considering the large number of jobs it provides.

CAPITAL EXPENDITURES

The food and beverage industry creates major ripple effects on the economy of Québec and its regions. For example, capital expenditures totalled $335.8 billion in 1989, up 2.2% compared to 1988, after a 29.8% increase the preceding year. In 1990, food and beverage producers expect their capital expenditures to again total almost $380 million.

HIGHLIGHTS

The Canada - U.S. Free Trade Agreement that came into effect on January 1, 1989, continuing GATT negotiations and a growing trend towards globalized markets have all had a bearing on major decisions made by Québec businesses in this sector. Slow growth in the domestic market intensifies the need for a greater openness on foreign markets.

Until now, reactions of businesses have been positive, judging from the strength of investments, which indicates their dynamism. Cumulated over the years 1988-89-90, capital expenditures for the industry should totalize more than $1 billion, a 50.0% increase over the three previous years.

The large number of company rationalizations discussed and implemented throughout the industry reflect the need for increased competitiveness in foreign and domestic markets. In addition to the sales-mergers over the last few years involving Nabisco, Kraft, Pillsbury, Tyson Foods, Catelli, Molson-O'Keefe and Steinberg, Saputo attempted to sell, consolidation in the Québec dairy industry and rationalization programs implemented at Provigo and Métro-Richelieu.

There was also a three-year agreement between the Group Olympia Ltée and a number of service-providers from the Manitoba pork industry which should prove profitable for this Québec firm.

SECTOR: FOOD AND BEVERAGES

STATISTICS	1986	1987	1988	1989	1989/1988 - % -
Consumer price index (1981=100)					
Food	118.8	122.4	126.9	129.8	2.3
Beverages	138.0	141.8	147.4	156.4	6.1
Industrial shipments ($'000 000 current)					
Québec					
Food	8 884.4	9 080.1	9 557.2	9 230.7	-3.4
Beverages	1 282.0	1 396.8	1 454.5	1 540.1	5.9
Total	10 166.4	10 476.9	11 011.7	10 770.8	-2.2
Canada					
Food	34 137.2	35 310.0	36 865.0	36 802.7	-0.2
Beverages	5 045.1	5 358.1	5 602.5	5 642.9	0.7
Total	39 182.3	40 668.1	42 467.5	42 445.6	-0.1
Industrial shipments ($'000 000 constant from 1981)					
Québec					
Food	7 478.5	7 418.4	7 531.3	7 111.5	-5.6
Beverages	929.0	985.0	986.8	984.7	-0.2
Total	8 407.4	8 403.4	8 518.1	8 096.2	-5.0
Canada					
Food	28 735.0	28 848.0	29 050.4	28 353.4	-2.4
Beverages	3 655.9	3 778.6	3 800.9	3 609.0	-5.0
Total	32 390.9	32 626.7	32 851.3	31 961.4	-2.7
Consumer price index					
Montréal (1981=100) - food	128.4	135.1	139.0	144.9	4.2
Retail sales value, grocery stores					
$'000 000 current	9 506.6	10 311.7	10 746.0	10 851.9	1.0
$'000 000 constant from 1981	7 403.9	7 632.6	7 730.9	7 489.2	-3.1
Sales value ($'000 000): restaurants, caterer and taverns	2 868	3 415	3 760	4 235	12.6
Capital expenditure ($'000 000)					
Food and beverages	202.3	253.1	328.6	335.8	2.2
Exports value ($'000 000)					
Agricultural and food products	1 300.2	1 257.5	1 182.7	1 132.7	-4.2
Beverages	108.4	112.8	103.7	N.D.	-
Total	1 300.2	1 257.5	1 156.2	N.D.	-
Imports value ($'000 000)					
Agricultural and food products	1 584.5	1 587.1	1 589.4	N.D.	-
Beverages	148.7	154.9	141.7	N.D.	-
Total	1 733.2	1 742.0	1 731.1	N.D.	-

Sources: 28, 35, 50, 59, 62, 67, 77, 80.

INTERNATIONAL TRADE OF AGRICULTURAL AND FOOD PRODUCTS

EXPORTS

Québec's world exports of agricultural and food products in 1988 totalled $1.18 billion compared to $1.26 billion in 1987, a slight decrease of 6%. The drop is attributed to lagging pork prices in 1988 and fewer dairy product sales.

The sector of livestock, meat and other animal products alone accounted for almost 41% of total receipts from export sales. In this group, meats are first, generating almost 30% of the total value of exports. Three quarters of receipts from meats are sales of pork. Lower prices in 1987 and 1988 contributed to fewer receipts in this group. Dairy products were second in Québec exports, accounting for almost 12%. This group has been falling steadily over the last several years because of fewer powder milk exports, due to a drop in butter production. Lower powder milk prices on the world market motivated manufacturers to use the powder more on the domestic market. Production of fat-free specialty cheeses provided the milk fat necessary for butter production and thus reduced the quantity of whole milk used for butter production and production of powder milk.

The performance of exports in the fisheries industry over the last several years has been good; in 1988 it represented approximately 15% of total export receipts. Finally, the beverages sector has also experienced healthy growth over the last several years. This sector accounted for 9% of total export sales in 1988.

Statistics available to date indicate that the value of exports for 1989 should dip only slightly by 2%.

IMPORTS

International imports of agricultural and food products settled at $1.67 billion compared to $1.74 billion 1987, down slightly 3%.

Among those products imported, fruits rank first with 22% of the total value of imports. Cocoa, coffee and tea comprise 17% of total purchases. Vegetables were third with 9%. Finally beverages accounted for 8% of Québec foreign purchases.

Compared to 1987, 1988 was characteristic of a strong increase in grain imports, particularly corn, complete livestock feed and meal. Animal products such as beef and fur grew significantly. In the fisheries sector, purchases fell almost 20%. In the horticulture sector, expenses remained steady, registering a slight drop in potatoes.

Statistics currently available suggest some stability in imports during 1989, Québec imports should compare with those of 1988.

SECTOR: INTERNATIONAL TRADE

STATISTICS	1985	1986	1987	1988	1988/1987 - % -
EXPORTS ($'000)					
Non-process grain	0	0	0	23	-
Cereal products	52 469	51 631	56 744	42 037	-25.9
Animal feeds	38 990	38 673	33 118	33 906	2.4
Non-process oilseed	0	0	0	217	-
Oilseed products	14 922	9 006	8 012	8 029	0.2
Live animals	23 558	15 531	23 310	25 466	9.2
Meats	348 750	413 390	391 390	351 396	-10.2
Other animal products	107 021	135 364	134 950	138 938	3.0
Dairy products	186 642	147 938	104 399	87 267	-16.4
Poultry meat and eggs	2 099	1 029	5 116	1 814	-64.5
Fish	49 090	66 674	81 630	78 343	-4.0
Mollusc and shellfish	55 338	75 195	66 914	79 984	19.5
Other sea products	5 740	4 934	3 911	11 893	204.1
Fruits and nuts	11 677	14 044	22 412	17 081	-23.8
Vegetables except potatoes	48 993	54 569	36 200	40 126	10.8
Table potatoes	566	641	661	949	43.6
Leeds	836	263	357	837	134.5
Honey, maple syrup products and sugar	43 301	65 280	52 565	43 610	-17.0
Tobacco and tobacco products	6 050	11 725	21 105	25 510	20.9
Cocoa, coffee and tea	50 151	52 426	60 823	57 133	-6.1
Other agricultural and food products	28 025	33 424	41 049	37 430	-8.8
Beverages	101 324	108 471	112 841	100 698	-10.8
Total agricultural and food products	1 175 542	1 300 208	1 257 507	1 182 687	-5.9
IMPORTS ($'000)					
Non-process grain	24 901	20 191	6 035	21 435	255.2
Cereal products	22 978	24 539	25 465	29 750	16.8
Animal feeds	8 970	8 747	10 196	23 814	133.6
Non-process oilseed	10 951	27	157	618	293.0
Oilseed products	62 724	54 931	58 550	67 547	15.4
Live animals	12 220	16 354	15 196	12 262	-19.3
Meats	69 914	66 342	87 287	98 015	12.3
Other animal products	48 778	56 601	61 499	90 099	46.5
Dairy products	44 351	50 486	58 717	50 943	-13.2
Poultry meat and eggs	9 183	11 055	14 470	13 218	-8.7
Fish	38 944	51 115	61 608	49 675	-19.4
Mollusc and shellfish	72 161	66 288	80 066	63 289	-21.0
Other sea products	1 698	2 663	4 002	5 905	47.6
Fruits and nuts	329 779	350 059	358 872	363 713	1.3
Vegetables except potatoes	122 213	129 323	136 491	145 848	6.9
Table potatoes	5 518	6 035	10 528	6 389	-39.3
Leeds	4 806	6 012	7 305	6 142	-15.9
Honey, maple syrup products and sugar	79 093	90 422	86 394	70 846	-18.0
Tobacco and tobacco products	15 972	13 421	13 049	12 331	-5.5
Cocoa, coffee and tea	282 170	374 443	300 193	283 681	-5.5
Other agricultural and food products	130 233	185 424	191 062	128 796	-32.6
Beverages	125 759	148 754	154 875	141 348	-8.7
Total agricultural and food products	1 523 316	1 733 233	1 742 015	1 685 664	-3.2

Sources: 28.

SECTOR: INTERNATIONAL TRADE PER CHAPTER, HARMONIZED SYSTEM

STATISTICS	1988	1989	1989/1988 - % -
EXPORTS ($'000)			
Live animals	25 277	28 720	13.6
Meat and edible meat offal	347 360	369 734	6.4
Fish and crustaceous, molluscs and other aquatic invertebrates	139 832	99 378	-28.9
Dairy produce; birds'eggs; natural honey; edible products of animal origin, n.e.s.	87 510	109 649	25.3
Products of animal origin, n.e.s.	17 257	20 426	18.4
Live trees and other plants; bulbs; roots and the like; cut flowers and ornemental foliage	11 941	10 411	-12.8
Edible vegetables and certain roots and tubers	32 847	37 451	14.0
Edible fruits and nuts; peel of citrus fruits and melons	15 324	10 256	-33.1
Coffee, tea, maté and spices	8 550	2 779	-67.5
Cereals	6 874	5 430	-21.0
Products of the milling industry, malt; starchs; inulin; wheat gluten	23 293	31 801	36.5
Oil seeds and oleaginous fruits; miscellanneous grains; seeds and fruits; etc.	12 822	4 141	-67.7
Lac, gums, resins and other vegetable saps and extracts	313	283	-9.6
Vegetable plaiting materials; vegetable products n.e.s.	114	70	-38.6
Ani/veg fats and oils and their cleavage products; prepare edible fats; ani/veg waxes	33 772	41 783	23.7
Preparation of meat, of fish or of crustaceous, molluscs or other aquatic invertebrates	26 500	20 953	-20.9
Sugars and sugar confectionery	41 921	41 367	-1.3
Cocoa and cocoa preparations	39 886	36 042	-9.6
Preparations of cereals, flour, starch or milk; pastrycooks products	18 832	8 575	-54.5
Preparations of vegetables, fruits, nuts or other parts of plants	10 585	12 060	13.9
Miscellanneous edible preparations	18 819	18 785	-0.2
Beverages, spirits and vinegar	103 728	99 951	-3.6
Residues and wastes from the food industries; prepared animal fodder	32 829	30 515	-7.0
Tobacco and manufactured tobacco substitutes	25 421	26 699	5.0
Total	1 081 607	1 067 259	-1.3
IMPORTS ($'000)			
Live animals	11 127	11 282	1.4
Meat and edible meat offal	101 599	103 512	1.9
Fish and crustaceous, molluscs and other aquatic invertebrates	79 116	74 738	-5.5
Dairy produce; birds'eggs; natural honey; edible products of animal origin, n.e.s.	53 778	50 525	-6.0
Products of animal origin, n.e.s.	13 519	12 133	-10.3
Live trees and other plants; bulbs; roots and the like; cut flowers and ornemental foliage	21 310	22 983	7.9
Edible vegetables and certain roots and tubers	124 976	129 960	4.0
Edible fruits and nuts; peel of citrus fruits and melons	262 171	240 510	-8.3
Coffee, tea, maté and spices	186 940	159 176	-14.9
Cereals	21 710	19 031	-12.3
Products of the milling industry, malt; starchs; inulin; wheat gluten	4 606	6 654	44.5
Oil seeds and oleaginous fruits; miscellanneous grains; seeds and fruits; etc.	29 322	35 421	20.8
Lac, gums, resins and other vegetable saps and extracts	9 656	8 559	-11.4
Vegetable plaiting materials; vegetable products n.e.s.	755	781	3.4
Ani/veg fats and oils and their cleavage products; prepare edible fats; ani/veg waxes	21 292	22 126	3.9
Preparation of meat, of fish or of crustaceous, molluscs or other aquatic invertebrates	46 409	41 613	-10.3
Sugars and sugar confectionery	70 564	116 362	64.9
Cocoa and cocoa preparations	81 086	71 194	-12.2
Preparations of cereals, flour, starch or milk; pastrycooks products	27 966	34 355	22.8
Preparations of vegetables, fruits, nuts or other parts of plants	112 918	109 069	-3.4
Miscellanneous edible preparations	55 459	47 039	-15.2
Beverages, spirits and vinegar	141 715	183 901	29.8
Residues and wastes from the food industries; prepared animal fodder	71 433	55 254	-22.6
Tobacco and manufactured tobacco substitutes	12 330	12 510	1.5
Total	1 561 757	1 568 688	0.4

Sources: 56, 58.

CHAPTER 2
LIVESTOCK PRODUCTIONS

DAIRY PRODUCTION

THE MARKET

Total Canadian consumption of dairy products remained steady over the last decade. It has however declined somewhat in 1990. The rapid decrease in consumption of butter has not been compensated for since the sale of cheeses with lower fat contents have not increased. The emergence of 1% milk should boost consumption of regular milk with less fat. Products, are extremely diversified, particularly cheeses, ice creams and yogurt, as much in their taste as in their contents and packages.

Québec, self-sufficient in the sector of fluid milk, produces 47% of the national industrial milk quota. It supplies the Canadian market with cheese and butter. Exports of these goods are small while exports of skim milk powder represent Québec's biggest export. Exports are controlled by programs of the Canadian Dairy Commission and dairy producers.

In the case of fluid milk, the Régie des marchés agricoles du Québec fixes, after hearings with interested parties, minimum and maximum retail and home delivery prices.

PRODUCTION

Milk production is subject to a quota program. The federal government guarantees producers of industrial milk a price based on production costs. To do this, the Canadian Dairy Commission administers a program to support prices and to purchase surplus butter and skim milk powder while it pays producers a subsidy of approximately $6.03/hectolitre. The costs of exporting surpluses of skim milk powder and any production balance surpassing quotas issued are financed through contributions from producers. The price of fluid milk is fixed by the Régie des marches agricoles du Québec, after hearings with parties involved.

ECONOMIC CONDITIONS

Over the last several years, the dairy industry has experienced a period of stability of prices and production. This balance came to an end in 1990. The Canadian Dairy Commission had to reduce the marketing quota by 3%. Conditions for supplying milk to Québec companies, renegotiation of GATT trade agreements and a review of milk policies are still heated subjects of debate.

British Columbia receives an additional 5% quota and continued to play a part in the national milk industry. The Régie des marchés agricoles was forced to go ahead with successive arbitrations between processing companies and the Federation of milk producers who could not agree on a method of supplying milk to plants. Agriculture Minister Michel Pagé intervened in negotiations scheduled for the summer of 1990 at the first agreement signed since 1985. As for international trade agreements, attention was focused on the Canadian position to reinforce and clarify section XI in March 1990.

On July 13, 1990, Aart De Zeeuw, Chairman of GATT's farm negotiating group, tabled his report. He considers this document a basis for negotiation. Mr. De Zeeuw recommends a substantial reduction in internal subsidies, including support prices for milk, and would diminish the role of the Canadian Dairy Commission as a marketing agent outside of Canada. He also proposes the conversion of import restrictions to tariff restrictions which would in turn be gradually reduced. These proposals signify in practice a repeal of section XI2c.I and long-term dismantlement of the supply management system. Québec is firmly opposed to these recommendations. In the early fall, a series of negotiation sessions will be held and should end in an agreement before January 1991.

SECTOR: DAIRY PRODUCTION

STATISTICS	1986	1987	1988	1989	1989/1988 - % -
PRODUCTION					
Number of producers	17 923	15 816	15 448	14 726	-4.7
Sales of fluid milk (kl)	687 898	696 359	703 927	697 437	-0.9
Sales of industrial milk (kl)	2 152 199	2 148 240	2 280 072	2 175 775	-4.6
Total sales (kl)	2 840 097	2 844 599	2 983 999	2 873 212	-3.7
Milk quota (milk fat) (tons) (1)					
Québec	80 048	79 962	81 101	81 070	-0.0
Canada	167 907	167 901	170 328	170 748	0.2
Cash receipts ($'000)	1 150 848	1 177 152	1 263 731	1 271 848	0.6
PROCESSING					
Shipments value ($'000)	2 650 829	2 883 500	3 163 400	2 960 400	-
Butter (tons)	48 968	45 381	50 928	45 259	-11.1
Milk powder (tons)	107 060	105 188	107 887	95 847	-11.2
Cheddar cheese (tons)	52 050	56 223	33 789	51 795	53.3
Speciality cheese (tons)	45 452	61 427	66 006	67 828	2.8
Yogurt (tons)	44 601	51 474	52 958	54 101	2.2
TOTAL CONSUMPTION					
Fresh milk (3,25%, 2%, 0%) ('000 kl)	656.6	661.7	645.4	N.D.	-
Cream ('000 kl)	28.4	29.4	28.2	N.D.	-
Butter ('000 tons)	29.8	30.1	29.6	N.D.	-
Milk powder ('000 tons)	15.6	20.6	17.4	N.D.	-
Cheddar cheese ('000 tons)	20.5	21.4	22.0	N.D.	-
Other cheese ('000 tons)	57.7	60.2	62.2	N.D.	-
Yogurt ('000 kl)	28.5	33.2	33.9	N.D.	-
LEVEL OF SELF-SUFFICIENCY (prod./cons.) (%)					
Butter	164.08	152.40	167.50	N.D.	-
Skim milk powder	516.48	359.99	473.00	N.D.	-
Cheddar cheese	253.27	249.89	252.12	N.D.	-
Total - cheese	134.56	143.18	155.32	N.D.	-
Yogurt	147.50	147.88	143.26	N.D.	-
TRADE ($'000)					
Exports value	147 938	104 399	87 266.9	N.D.	-
Imports value	50 486	58 717	50 942.6	N.D.	-
Trade balance	97 452	45 682	36 324.3	N.D.	-

(1) To July 31.

Sources: 3, 17, 24, 28, 29, 30, 33, 37, 38, 51, 75, 79.

HOG PRODUCTION

THE MARKET

Since March 1989, hogs produced in Québec have been marketed by means of an electronic bidding system. This system ensures slaughterhouses a steady supply and ensures a uniform price for a product of equal quality, regardless of the region or the volume agreed upon. Average prices in 1989 were $135 per 100 kilograms in Québec (100 index) compared to $138 in Ontario. Prices steadied during the first quarter of 1990, following American prices. It peaked several times at more than US$65 per hundred weight from May through July 1990. The processing industry is highly concentrated in Québec, with three companies, Groupe Olympia, Coopérative fédérée and J.N. Brochu, handling more than 80% of slaughters. The province consumes on average 198 thousand tons of pork per year. The volume of Canadian pork exports to the United States fell 14% in 1989 compared to 1988, while they respectively increased 20% and 70% to Japan and other destinations, for an overall decline of 6% in 1989. Approximately 80% of total pork exports in 1989 went to the United States.

PRODUCTION

The pork sector is the second largest agricultural production after dairy production and comprises almost 4 300 producers who raised 4.8 million hogs in 1989, yielding cash receipts of $555 million. Québec production and slaughters represented respectively in 1989, 30% and 34% of the Canadian total. Québec slaughters fell 5.5% in 1989 compared to 1988 due to a decline in the number of hogs from Ontario. Canadian production should decrease 2% in 1990 compared to 1989. Québec depends on exports since production represents 150% of its needs. Canadian self-sufficiency is at a similar level.

ECONOMIC CONDITION

The United States has imposed a countervailing duty of 3.6 cents per pound of Canadian pork that came into effect on September 13, 1989. Producers and processors in Canada and Québec appealed this decision under the Free Trade Agreement. The two committees formed to resolve disagreements are supposed to render their decisions before fall 1990. On the other hand, the duty on live hogs for 1986-1987 and 1987-1988 is currently under review; it should drop from 2.2 cents per pound (live weight) to 0.6 and 0.7 cents respectively for these two years. However, the duty is expected to increase over the next two periods as a result of tripartite stabilization payments paid in 1989. The decision from the GATT panel regarding Canada's protest against the continuous line principle applied in the American trade law, should also be rendered during the summer of 1990.

SECTOR: HOG PRODUCTION

STATISTICS	1986	1987	1988	1989	1989/1988 - % -
INVENTORY ('000 head)					
Sows					
Québec	278.0	286.0	284.0	290.0	2.1
Ontario	339.0	355.0	355.0	310.0	-12.7
Western provinces	360.0	392.0	409.0	412.3	0.8
Canada	1 014.8	1 071.7	1 086.3	1 070.0	-1.5
PRODUCTION ('000 head)					
Slaughter hogs					
Québec					
Inventory	2 646.0	2 715.0	2 782.0	3 130.0	12.5
Production	4 649.7	4 640.8	4 763.0	4 852.4	1.9
Slaughters	5 078.1	5 063.9	5 444.9	5 142.8	-5.5
Ontario					
Inventory	2 789.0	2 982.0	2 992.0	3 115.0	4.1
Production	4 879.9	4 957.7	5 143.9	4 924.3	-4.3
Slaughters	4 116.8	4 240.3	4 258.4	4 420.4	3.8
Western provinces					
Inventory	3 039.7	3 316.6	3 578.5	4 007.0	12.0
Production	4 882.6	5 137.6	5 931.6	6 267.9	5.7
Slaughters	4 578.7	4 842.9	5 133.6	5 361.9	4.4
Canada					
Inventory	8 803.7	9 355.6	9 692.4	10 634.5	9.7
Production	15 026.3	15 350.3	16 462.3	16 707.9	1.5
Slaughters	14 338.4	14 733.9	15 431.8	15 487.8	0.4
United States (all hogs)					
Inventory	41 100	39 690	42 675	43 210	1.3
Slaughters	79 598	81 081	87 795	88 693	1.0
CASH RECEIPTS ($'000)					
Québec	672 815	651 747	532 779	537 572	0.9
Ontario	680 465	682 397	557 239	535 118	-4.0
Western provinces	680 681	700 814	632 750	646 213	2.1
Canada	2 121 228	2 119 577	1 778 378	1 787 732	0.5
United States	9 716 044	10 326 387	N.D.	N.D.	-
PRICES					
Index 100 - Toronto ($CAN/100 lb)	81.37	79.61	63.18	62.17	-1.6
FPPQ - Québec's electronic auction (1)	-	-	-	-	-
TRADE					
Meat imports					
Volume sales (tons)					
Québec	3 034	4 040	2 491	N.D.	-
Canada	11 397	13 773	9 832	7 581	-22.9
Value ($'000)					
Québec	9 175.0	14 054.4	7 093	N.D.	-
Canada	37 465.7	49 059.0	30 740	27 075	-11.9
Meat exports					
Volume sales (tons)					
Québec	102 509	98 681	106 642	N.D.	-
Canada	205 396	223 825	243 647	228 440	-6.2
Value ($'000)					
Québec	310 231.4	295 404.8	255 539	N.D.	-
Canada	627 756.8	671 716.5	580 501	563 719	-2.9
INCOME STABILISATION SCHEME (2)					
Piglets					
Number of insured units	243 404	227 509	219 427	254 965	16.2
Garanteed price ($/piglets)	40.68	39.64	41.59	48.75	17.2
Market price ($/piglets)	36.09	47.68	44.19	35.35	-20.0
Total payment ($'000)	19 005.0	0.0	0.0	28 794.0	-
Slaughter hogs					
Number of insured units	3 330 868	3 199 680	3 042 516	3 997 136	31.4
Garanteed price ($/hogs)	165.76	168.32	177.07	173.90	-1.8
Market price ($/hogs)	151.79	184.85	172.13	135.77	-21.1
Total payment ($'000)	31 077.0	0.0	11 652.8	93 676.0	703.9

(1) Began in March 1989.
(2) Values refer to the marketing year, as given by RAAQ. For example, 1986 means 1985-1986

Sources: 6, 37, 38, 47, 49, 73, 75, 78, 82, 83.

CATTLE PRODUCTION

MARKET AND PRODUCTION

On the whole, cattle production generates farm cash receipts of approximately $300 million a year in Québec, and represents 30% and 8% of production in Ontario and in Canada respectively. Receipts for the sector represent less than 10% of overall farm cash receipts in Québec and less than 60% of those for the hog industry.

Production includes two relatively different segments, veal and cattle. Québec produces almost 300 000 head in each category each year. Canada annually produces approximately 900 000 head of veal and more than 4 million head of slaughter cattle. Québec therefore represents 30% of Canadian calf production but less than 10% of slaughter cattle production.

In 1989, cattle production grew 7.2% in Québec after shortfall years in 1988 and 1987. The production level for 1989 is comparable to that of 1985. In Canada, progress was less than 2% in 1989 but it has grown almost 20% since 1985.

Calf production has fallen slightly in Québec and in Canada over the last two to three years.

Due to growth in production and prices in this sector in 1989, farm cash receipts increased 6% in Québec. By comparison, farm cash receipts fell slightly in Ontario and Canada in 1989.

ECONOMIC CONDITIONS

After a long period of liquidation on the American market over the past several years the entire North American cattle herd is replenishing itself. In addition to normal production cycles, other factors may influence these variables, particularly climatic conditions which affect grain and forage production.

In Canada, stocks have been replenishing over the last several years and production is generally up in response to prices.

According to Agriculture Canada's latest predictions for price and production in the cattle industry, we can expect very small increases in farm cash receipts in Québec during 1990. Slight increases in cattle prices will be offset by a drop in production and in the price of veal.

SECTOR: CATTLE PRODUCTION

STATISTICS	1986	1987	1988	1989	1989/1988 - % -
INVENTORY ('000 head)					
Slaughter cows					
Québec	160.0	165.0	170.0	175.0	2.9
Canada	3 223.8	3 254.6	3 352.1	3 367.5	0.5
United States (January 1st)	33 632.0	33 779.0	33 183.0	33 515.0	1.0
Cattle and calves					
Québec	1 506.0	1 492.0	1 504.0	1 390.0	-7.6
Canada	11 776.7	11 749.9	12 060.2	11 016.1	-8.7
United States (January 1st)	105 468.0	102 000.0	99 622.0	99 160.0	-0.4
PRODUCTION ('000 head) (slaughter and exports)					
Slaughter cattle					
Québec	361.2	315.9	292.3	313.5	7.3
Ontario	1 110.4	1 013.2	955.8	927.7	-2.9
Western provinces	2 516.3	2 472.4	2 729.6	2 801.1	2.6
Canada	4 097.5	3 907.8	4 076.3	4 140.3	1.6
Slaughter calves					
Québec	334.7	319.8	317.5	313.5	-1.3
Ontario	210.4	194.7	195.4	200.3	2.5
Western provinces	343.9	347.3	348.7	349.2	0.1
Canada	911.2	883.6	881.4	881.3	-0.0
CASH RECEIPTS ($'000)					
Québec	296 333	228 842	299 269	317 327	6.0
Ontario	1 133 004	1 071 401	1 012 743	1 006 158	-0.7
Western provinces	2 050 373	2 287 632	2 528 493	2 499 689	-1.1
Canada	3 564 389	3 756 610	3 928 624	3 904 968	-0.6
PRICES ($/100 lb)					
A1, A2 Slaughter cattle (1 000 lbs and overs) Québec (slaughterhouse, carcass basis)	74.91	83.08	80.04	81.46	1.8
A1, A2 Steers (1 000 lbs and over) Toronto (public stockyards)	82.66	88.89	87.35	88.82	1.7
Feeder steers (800 - 900 lbs)					
Toronto (public stockyards)	84.40	94.19	91.93	89.95	-2.2
Edmonton (public stockyards)	80.88	94.90	92.01	89.77	-2.4
D1, 2 Cows Toronto (public stockyards)	52.71	60.99	57.91	56.86	-1.8
A2 Grain fed veal (carcass basis) Québec (electronic auction, Saint-Hyacinthe)	82.25	N.D.	161.64	167.89	3.9
QUÉBEC INCOME STABILISATION SCHEME					
Feeder calves (1)					
Number of insured units	143 266	146 222	143 935	153 292	6.5
Garanteed price ($/100 kg)	354.83	342.40	348.06	365.83	5.1
Market price ($/100 kg specialised auctions)	213.01	255.67	221.17	224.34	1.4
Total payment ($'000)	32 818.3	22 807.7	34 467.8	39 694.9	15.2
Slaughter cattle (1)					
Number of insured units	70 559	63 927	68 097	69 293	1.8
Garanteed price ($/100 kg)	207.36	216.91	238.41	227.62	-4.5
Market price ($/100 kg slaughterhouse live basis)	175.38	190.83	183.20	187.57	2.4
Total payment ($'000)	11 988.7	9 011.8	20 776.4	15 199.0	-26.8
Grain fed veal					
Number of insured units	97 207	63 415	61 054	55 510	-9.1
Garanteed price ($/100 kg)	228.42	231.83	251.85	N.D.	-
Market price ($/100 kg) (electronic auction live basis)	189.18	206.33	218.08	N.D.	5.7
Total payment ($'000)	7 927.2	3 497.3	4 613.8	N.D.	-
Milk fed veal					
Number of insured units	-	54 826	64 059	74 142	15.7
Garanteed price ($/100 kg)	-	348.49	391.25	N.D.	-
Market price ($/100 kg) (slaughterhouse carcass basis)	-	334.24	358.13	N.D.	-
Total payment ($'000)	-	1 460.0	4 016.5	N.D.	-

(1) For feeder calves and slaughter cattles, the current year corresponds to the marketing year. For example, 1986 covers the period from October 1985 to September 1986.
(2) The electronic auction started in August 1987.
Sources: 6, 47, 49, 73, 75.

SHEEP PRODUCTION

MARKET AND PRODUCTION

Québec sheep production totals approximately 70 000 head, slightly less than the 50% and 20% produced by Ontario and Canada. This production generates annual farm cash receipts of $6 million in Québec compared to $10 million in Ontario and $31 million in Canada and represents scarcely 0.2% of farm cash receipts in Québec

In 1989, sheep production grew 6% in Québec (4 200 head) compared to levels two years previous. This growth in production in 1989 brought production back to its 1986 level. For the same year 1989, Ontario and Canada experienced growth of 10% and 7% respectively.

However, prices were down in 1989, particularly prices for light lambs which fell more than 10%.

For this reason, farm cash receipts from this production have been relatively stagnant in Québec over the last three or four years. They even fell 5% in 1989. However, total compensations paid in income stabilization insurance in this sector rose 13% during the same year.

ECONOMIC CONDITIONS

Québec production meets almost 20% of consumer demand for mutton. To meet this demand, Québec imports from New Zealand, Australia and other Canadian provinces.

Québec production for the most part is centred on the sale of milk-fed lambs at Easter and heavy lambs in late summer and early fall. Penetration of Québec heavy lambs in food stores is therefore largely suppressed by an irregular supply and lower prices for imported lamb. To improve this situation, Québec must become increasingly competitive if it wishes to supply its own market.

SECTOR: SHEEP PRODUCTION

STATISTICS	1986	1987	1988	1989	1989/1988 - % -
PRODUCTION ('000 head) (slaughters and exports)					
Sheep and lambs					
Québec	74.1	70.6	70.3	74.5	6.0
Ontario	146.1	142.3	147.4	162.7	10.4
Canada	418.0	403.5	415.6	446.8	7.5
CASH RECEIPTS ($'000)					
Québec	6 599	6 300	6 288	5 957	-5.3
Ontario	11 006	11 570	10 245	9 703	-5.3
Canada	33 588	35 583	32 137	31 372	-2.4
QUÉBEC PRODUCTION ('000 head)					
Lambs	59 091	59 429	58 578	61 061	4.2
Sheep	15 008	11 171	11 722	13 439	14.6
QUÉBEC PRICES ($/100 kg)(1)					
Lambs	278.60	265.43	276.04	246.50	-10.7
Sheep	110.23	118.19	104.63	104.98	0.3
TRADES					
Imports					
Live sheep and lambs (number)					
Québec	41	2	17	N.D.	-
Canada	36 979	34 227	41 670	34 252	-17.8
Meat (tons)					
Québec	2 342	2 610	960	N.D.	-
Canada	15 148	13 965	12 473	11 531	-7.6
INCOME STABILISATION SCHEME (2)					
Lambs					
Number of insured units	62 811	62 033	59 789	58 801	-1.7
Garanteed price ($/100 kg)	460.45	465.19	492.09	526.73	7.0
Market price ($/100 kg)					
(live basis, auctions and slaughterhouse)	250.29	274.58	309.26	344.67	11.4
Total payment ($'000)	3 924.43	3 515.41	3 249.53	3 676.80	13.1

(1) Price at Saint-Hyacinthe auction.
(2) Values refer to the marketing year, as given by RAAQ. For example, 1986 means 1986-1987.
Sources: 6, 21, 25, 38, 47, 49, 57.

POULTRY

CHICKEN

After a drop in production in 1989, the 1990 quota increased 4.3%. This growth in production will allow production to better meet the needs of the Québec market. However, because Ontario has produced on an irregular basis and was unable to meet its quota, Québec had to supply part of the product that was unavailable in this province. The lack of product on the Canadian market stimulated a growth in imports at the beginning of 1990 and increased wholesale prices.

British Columbia withdrew from the national marketing plan on January 1, 1990. This province now produces more than the quota it was allowed previously. These surpluses are sold in neighbouring provinces which in turn forces these provinces to sell off a portion of their production in the East. This has upset the entire Canadian market.

TURKEY

Production in 1989 conformed almost exactly to the quota Québec was given. The 1990 allotment is 2% higher. Québec has experienced periods of excessive storage coupled with prices below production costs. This situation is due to difficulties in controlling turkey production according to category and according to period. The needs of the market require more discipline in production. In Québec, like anywhere else, production of 8 kg and +8 kg turkeys per period is rarely respected. This situation must therefore be corrected to better satisfy the needs of the market.

ECONOMIC CONDITIONS

In the short term, chicken and turkey consumption should grow in Québec and Canada and the quota should increase. The needs of the processing industry and restaurant industry should incite changes in the operations of marketing agencies.

Two factors may have more important long-term effects. The federal government, as part of the review process of national farm policies, set up a federal-provincial committee to make recommendations on the future of national poultry marketing agencies. This committee should table its report in the fall. Major changes are expected.

On the other hand, the very existence of marketing agencies has been called into question in the report of the Chairman of GATT's farm negotiating group. The De Zeeuw report proposes the elimination of all trade barriers to have them replaced with reduced tariffs, which would prevent Canada from controlling imports. The report also proposes reduced internal subsidies, doing this would eliminate the main incentive to control production. Finally, De Zeeuw would take away from marketing agencies the role they play in exports including their responsibilities of managing funds for producers. This report is currently the subject of spirited discussions between the United States and the European Economic Community. It is doubtful that all the recommendations in the report will be applied even in the long-term, it will certainly dominate discussions in the future.

SECTOR: POULTRY

STATISTICS	1985	1986	1987	1988	1989	1989/1988 - % -
PRODUCTION						
Number of quota holder						
Chicken	910	884	859	848	668	-21.2
Turkey	223	218	233	232	140	-39.7
Poultry	911	878	1 092	1 078	808	-25.0
Quota (tons)						
Chicken						
Québec	144 287	148 719	159 594	164 710	160 263	-2.7
Ontario	-	-	-	-	-	-
Canada	454 127	475 701	512 638	528 219	518 386	-1.9
Turkey						
Québec	24 494	24 714	26 730	26 730	26 871	0.5
Ontario	-	-	-	-	-	-
Canada	100 292	102 967	114 035	114 035	116 822	2.4
Volume (tons, eviscerated weight)						
Chicken	145 783	149 477	159 956	163 688	162 647	-0.6
Turkey	24 288	24 167	26 195	26 973	27 467	1.8
PROCESSING						
Number of establishments	29	29	N.D.	N.D.	N.D.	-
Number of employees	3 096	3 082	N.D.	N.D.	N.D.	-
Shipments value ($'000)	418 152	434 330	N.D.	N.D.	N.D.	-
Slaughters in Canada (tons)						
Chicken	462 348	478 205	524 150	529 675	529 303	-0.1
Turkey	101 316	104 894	114 875	118 250	120 545	1.9
Hen	26 043	26 539	27 971	29 879	28 754	-3.8
CONSUMPTION						
Consumption (kg/person)						
Chicken	22.36	22.87	24.24	25.22	N.D.	-
Turkey	3.26	3.32	3.39	3.56	N.D.	-
Hen	1.6	1.66	1.79	1.73	N.D.	-
Total consumption ('000 tons)						
Chicken	145.7	149.6	159.8	167.5	N.D.	-
Turkey	21.2	21.7	22.4	23.6	N.D.	-
Hen	10.4	10.9	11.8	11.5	N.D.	-
SELF-SUFFICIENCY RATIO (%)						
Chicken	100.06	99.92	100.10	97.72	N.D.	-
Turkey	114.57	111.37	116.94	114.29	N.D.	-
PRICES - MONTRÉAL($/kg eviscerated)						
At the farm (live)						
Chicken	1.03	1.08	1.03	1.08	1.21	12.0
Turkey	1.40	1.38	1.36	1.38	1.44	4.3
Wholesale prices (fresh eviscerated)						
Chicken	2.02	2.14	2.07	2.13	2.51	17.8
Turkey	2.76	2.81	2.72	2.73	2.57	-5.9
Retail prices (eviscerated)						
Chicken (fresh)	2.78	3.46	3.65	3.85	4.57	18.7
Turkey (frozen)	3.83	4.05	4.11	4.02	3.93	-2.2
CASH RECEIPTS ($'000)						
Chicken	208 752	223 733	270 275	245 262	276 500	12.7
Turkey	41 285	40 620	42 738	44 681	48 232	7.9
Hen	2 880	3 159	3 649	3 965	4 448	12.2
Total - poultry	252 917	267 512	270 274	293 908	329 180	12.0
TRADE ($)						
Imports						
Chicken	7 907 359	9 026 874	9 647 533	9 163 042	N.D.	-
Turkey	N.D.	29 507	1 075 866	2 398	N.D.	-
Other poultry	1 045 814	1 104 682	945 667	5 000 728	N.D.	-
Exports						
Chicken	342 676	277 185	3 756 126	1 279 039	N.D.	-
Other poultry	699 577	653 528	948 195	378 485	N.D.	-

Sources: 3, 4, 5, 26, 29, 35, 37, 38, 40, 61.
Canadian chicken marketing agency.
Canadian turkey marketing agency.

EGG PRODUCTION

MARKET

In Québec, as in the rest of Canada, fresh egg consumption has been falling on average 1% per year, while consumption of processed eggs has increased almost 5% each year. In 1987, egg consumption per person in Québec was 15.3 dozen; of this number, almost 13.8 dozen were consumed in their fresh state. Because our production meets only approximately 70% of our needs, Ontario makes up for our production shortage.

PRODUCTION

The province of Québec ranks second among Canadian provinces, after Ontario, in egg production. In August 1989, quotas held by the 183 producers registered with the Fédération des producteurs d'oeufs de consommation du Québec represented 3 191 686 laying hens or 16.6% of the national quota.

In 1989, 62 establishments held a permit to grade eggs and the five biggest companies graded two-thirds of Québec production.

Only two companies process eggs into a liquid or frozen product. These companies are generally supplied from surplus declared to the Canadian Egg Marketing Agency (CEMA).

ECONOMIC CONDITIONS

The Fédération des producteurs d'oeufs de consommation du Québec administers the joint plan and participates in CEMA management. The supply management system includes a national price fixing formula based on production costs and a control program for eggs declared surplus. Since eggs must be transported from producer provinces to provinces with high consumption, the formula takes into account costs to transport eggs from one province to another. Over the last year, the surplus management system placed the CEMA in a difficult financial position. This situation came about for a number of reasons, including a price increase for fresh eggs, a surplus increase and prices on the international market which have not increased in proportion to our domestic egg consumption.

SECTOR: EGG PRODUCTION

STATISTICS	1986	1987	1988	1989	1989/1988 - % -
TOTAL PRODUCTION ('000 dozen) (including hatchering eggs)					
Québec	78 209	79 128	81 802	80 828	-1.2
Ontario	182 639	182 582	180 560	176 393	-2.3
Canada	472 262	475 468	476 748	468 648	-1.7
PRODUCTION utilised for consumption ('000 dozen)					
Québec	68 387	68 299	70 975	69 522	-2.0
Ontario	183 115	168 985	167 808	163 030	-2.8
Canada	439 070	433 454	436 009	427 319	-2.0
QUOTA (layers)					
Québec	3 228 549	3 228 549	3 228 549	3 191 686	-1.1
Ontario	7 448 593	7 448 593	7 448 593	7 208 665	-3.2
Canada	19 496 299	19 496 299	19 496 299	19 105 974	-2.0
RECEIPTS AT REGISTERED STATIONS ('000 dozen)					
Québec	68 236.6	68 065.2	68 398.9	N.D.	N.D.
Ontario	165 821.9	168 725.3	169 269.1	N.D.	N.D.
Canada	409 347.0	411 319.8	413 202.4	N.D.	N.D.
SALES VOLUME ('000 dozen)					
Québec	67 846	67 821	70 486	69 020	-2.1
Canada	429 080	428 933	429 893	421 058	-2.1
SALES VALUE ($'000)					
Québec	63 631	62 113	69 467	74 528	7.3
Canada	394 537	384 007	414 779	452 189	9.0
FARM CONSUMPTION					
Volume ('000 dozen)	541	478	489	502	2.7
Value ($'000)	657	568	611	676	10.6
TOTAL CONSUMPTION ('000 dozen)					
Québec	102 587	101 117	103 266	N.D.	-
Canada	439 065	433 451	443 167	N.D.	-
SELF-SUFFICIENCY RATIO (%)					
Québec	66.7	67.5	68.7	N.D.	-
Canada	100.0	100.0	98.4	N.D.	-
CASH RECEIPTS ($'000)	63 631	62 113	69 467	70 607	1.6
FARM PRICE ($/dozen)	0.93	0.91	0.98	1.08	10.2
TRADE					
Shell eggs ('000 dozen)					
Interprovincial imports					
Québec	22 557.0	25 252.6	28 508.9	28 191.6	-1.1
Ontario	9 550.4	15 142.7	18 679.9	17 722.9	-5.1
Interprovincial exports					
Québec	2 854.7	5 382.7	5 749.7	6 315.2	9.8
Ontario	20 265.6	22 284.3	27 333.8	23 375.9	-14.5

Sources: 3, 4, 5, 29, 35, 69, 71.

HATCHERY INDUSTRY

MARKET

Since May 8, 1989, hatchery eggs for table chickens and chicks for chicken production have been controlled. The overall import quota was set at 19.1% of indoor production of the previous year. This measure slowed the huge increase in imports over the last several years in Québec and Canada.

PRODUCTION

From January 1 through June 2 1990, the incubation of hatchery eggs for table chickens grew 1% over the same period in 1988 and production rose 2.5%. Chicks hatched for chicken production declined 1.7% over the period. During this period, at the Canadian level, the number of hatchery eggs for table chickens placed in incubators grew 7.3% and chicks hatched for chicken production rose 4.2%.

ECONOMIC CONDITIONS

Producers of hatchery eggs produce according to a controlled demand of chicken, turkey and laying hen from poultry breeders. Producers must constantly adjust their level of production in order to meet the needs of poultry breeders. Trends observed in the production of poultry and eggs for consumption will directly influence the production growth of hatchery eggs.

SECTOR: HATCHERY INDUSTRY

STATISTICS	1986	1987	1988	1989	1989/1988 - % -
PRODUCTION					
Quota ('000 eggs)					
Québec	108 349.3	125 426.8	128 492.2	124 340.8	-3.2
Ontario	119 421.9	138 287.2	141 382.3	138 144.9	-2.3
Canada	381 199.5	428 378.1	438 807.7	431 102.4	-1.8
Volume ('000 dozens)	9 822	10 829	10 827	11 306	4.4
Sales value ($'000)	25 930	28 588	28 584	29 848	4.4
PROCESSING					
Chicks hatched and placed ('000 eggs)					
Egg production chicks	3 374.5	3 623.7	3 320.0	3 332.0	0.4
Broiler production chicks	104 210.0	113 924.5	118 441.0	119 907.0	1.2
Broiler and heavy poults	3 496.0	3 493.0	3 446.0	3 726.0	8.1
MARKET					
Placement ('000 head)					
Egg production chicks	3 974.2	4 054.6	3 986.7	3 914.4	-1.1
Broiler production chicks	106 659.4	112 367.2	121 579.6	120 215.1	-1.8
Broiler and heavy poults	5 038.8	5 218.0	5 178.2	5 476.4	5.8
SELF-SUFFICIENCY RATIO (%)					
Egg production chicks	84.91	89.37	83.28	85.12	2.2
Broiler production chicks	97.70	101.39	97.42	99.74	2.4
Broiler and heavy poults	69.38	66.94	66.55	68.04	2.2
Total					
CASH RECEIPTS ($'000)	25 930	28 588	28 584	29 601	3.6
TRADE					
Imports (international and interprovincial)					
Hatching eggs ('000 eggs)	18 413.5	27 050.0	30 550.0	26 819.2	-12.2
Chicks ('000 head)	12 890.1	7 764.9	7 531.6	5 195.5	-31.0
Poults ('000 head)	567.0	432.9	571.0	430.5	-24.6
Exports (international and interprovincial)					
Hatching eggs ('000 eggs)	2 878.2	1 158.9	1 997.3	1 279.1	-36.0
Chicks ('000 head)	3 278.1	3 744.3	7 622.4	3 785.5	-50.3
Poults ('000 head)	661.6	1 058.9	1 045.1	823.6	-21.2

Sources: 8, 35, 69, 81.

FUR INDUSTRY

MARKET

There was a glut on the world market this year because European producers were marketing a record number of skins. This situation created conditions rarely seen before on markets. Mink which, in 1988-1989, was already selling at very low prices, was selling for even less that year. The market for fox was even worse. Although prices had already dropped 50% in 1988-89, they dropped another 50% in 1989-90 where they are now sitting at almost 25% of prices during 1987-88. There was a slump in the number of pelts, and warehouse inventories are still very high.

PRODUCTION

After a sharp drop in 1986, Québec mink production has stabilized. Despite low prices, mink production remained steady in 1989. Québec producers were no doubt hoping for a better outcome.

As for fox producers, after encouraging growth in 1988, production rose only slightly in 1989.

ECONOMIC CONDITIONS

Fur production on the world market is expected to fall sharply. Adjustments are currently taking place in countries of the European Economic Community and scandinavian countries. These justifications should normally stimulate better prices. However, this beneficial effect will be abated by the volume of unsold stocks. We can expect a small-scale recovery.

In Québec, the volume of production should fall dramatically among mink and fox breeders. However, the effect should hit mink breeders harder because of how the industry is structured.

SECTOR: FUR INDUSTRY

STATISTICS	1985	1986	1987	1988	1988/1987 - % -
LIVESTOCK					
Mink					
Number of farms	79	50	61	42	-31.1
Number in farms at January 1	90 761	49 627	43 866	50 187	14.4
Bought or taken as boarder	9 967	10 800	8 222	15 246	85.4
Born	246 097	136 172	124 011	133 536	7.7
Sold alive and boarders removed	7 767	8 389	10 413	15 520	49.0
Died, escaped or lost (not pelted)	22 132	8 278	7 633	9 954	30.4
Pelted	246 437	136 343	109 885	127 186	15.7
Fox					
Number of farms	80	96	122	42	-65.6
Number in farms at January 1	4 919	5 476	6 241	8 175	31.0
Bought or taken as boarder	158	493	772	368	-52.3
Born	7 913	9 296	11 482	14 410	25.5
Sold alive and boarders removed	630	777	1 076	789	-26.7
Died, escaped or lost (not pelted)	268	1 167	518	698	34.7
Pelted	7 002	7 434	8 538	13 147	54.0
AVERAGE PRICE ($/pelt)					
Mink					
Pastel					
- Québec	22.29	36.58	26.82	19.71	-26.5
- Canada	24.34	40.08	30.76	21.94	-28.7
Demi-buff					
- Québec	27.10	41.87	35.93	21.45	-40.3
- Canada	29.50	50.49	43.88	23.25	-47.0
Dark					
- Québec	32.67	52.25	44.19	29.46	-33.3
- Canada	39.33	59.67	47.89	31.49	-34.2
Sapphire					
- Québec	20.75	37.67	26.58	20.26	-23.8
- Canada	25.12	41.20	38.14	31.30	-17.9
Violet					
- Québec	20.81	38.98	34.28	28.03	-18.2
- Canada	25.37	44.79	38.48	34.13	-11.3
Fox					
Ranched silver					
- Québec	112.60	193.82	124.18	70.03	-43.6
- Canada	117.88	198.49	125.12	72.24	-42.3
Pearl platinum					
- Québec	81.66	107.50	81.56	36.38	-55.4
- Canada	117.70	135.07	82.97	40.45	-51.2
Platinum					
- Québec	90.74	133.57	74.33	41.59	-44.0
- Canada	105.29	146.39	74.47	46.47	-37.6
Ranched cross					
- Québec	98.82	134.98	72.51	59.05	-18.6
- Canada	109.76	151.21	87.29	72.33	-17.1

Sources: 18, 19, 74.

APICULTURE

IMPORTANCE AND PROFILE

In 1989, there were 1 491 beekeepers and more than 45 000 beehives in operation in Québec. This activity generated 2 343 tonnes of honey and receipts worth $6.7 million, which was comparable to receipts in the sheep sector. It represents approximately 10% of Canadian beekeeping, the Prairie provinces being the most productive regions in Canada.

In Québec, pollination represents an underdeveloped potential in this area, and which could be used in the future to turn a profit for this sector.

MARKET AND PRODUCTION

Indicators of production show a relatively sharp drop in Québec during 1989 compared to previous years. A drop in the number of beekeepers and beehives reflects changes in techniques but indicates also a general downturn in Québec and Canada over the last several years.

Despite revitalized yields in Québec, honey production continued to plummet, falling 22% in 1989 after a 32% drop in 1988. Despite some renewed strength in prices at the farm, receipts continued to fall throughout Québec, 17% in 1989, following a 27% decrease in 1988. In Canada, total honey yield was approximately 28 000 tonnes in 1989, down 21% after a 11% drop the previous year.

Average annual consumption of honey is approximately 26 000 tons in Canada and more than 5 000 tons in Québec. On average, Canada exports about one-third of its production. Québec, on the other hand, is slowly returning to a level of self-sufficiency of 50-60%, but this does not prevent companies from developing and maintaining outside markets.

OUTLOOK AND ECONOMIC CONDITIONS

Distortions due to American policies explain in part the economic conditions of beekeeping in Canada and in Québec over the last several years. The American's high support prices first caused stocks to accumulate, then reduced support prices and liquidation of stocks in the United States caused prices and production to drop in Canada.

Because there are now fewer distortions, prices should begin to rally and production should renew itself somewhat in Canada. The introduction of a tripartite stabilization program for honey prices should also have a positive effect on production. Problems with epidemics over the last few years may however slow this growth.

SECTOR: APICULTURE

STATISTICS	1986	1987	1988	1989	1989/1988 - % -
Number of beekeepers	3 500	3 300	3 000	1 491	-50.3
Number of beehives	100 000	97 000	90 000	45 589	-49.3
PRODUCTION					
Québec					
Per beehive (kg)	28	46	33	51	54.5
Total (tons)	2 800	4 445	3 003	2 343	-22.0
Canada					
Total (tons)	33 800	39 776	35 415	28 096	-20.7
United States					
Total (tons)	91 000	102 000	N.D.	N.D.	-
TOTAL FARMS VALUE OF PRODUCTION ($'000)	7 238	11 179	8 141	6 722	-17.4
TRADES					
Exports					
Québec					
Volume (tons)	743	349	380	N.D.	-
Value ($'000)	1 092	622	529	N.D.	-
Canada					
Volume (tons)	11 927	10 903	14 208	21 117	48.6
Value ($'000)	18 374	15 380	16 421	23 318	42.0

Sources: 1, 14, 37, 55, 72.

CHAPTER 3
CROP PRODUCTION

VEGETABLES

MARKET

In 1988, total vegetable consumption in Québec, except for potatoes, yielded 833 000 tons comprised of 525 000 tons of fresh vegetables and 308 000 tons of processed vegetables. Tomato consumption alone was an estimated 295 000 tons; 75% of which was in its processed form.

Vegetable consumption experienced healthy growth from 1972 through 1988 where it increased 37 kg per person (potatoes excluded), going from 84 kg in 1972 to 121 kg per person in 1988. Over this 17-year period, consumption of fresh vegetables grew 78% and consumption of processed vegetables grew 40%.

The American market is enticing and Québec market gardeners know how to turn a profit, despite strong competition. In 1988, 19 177 tons of carrots, 1 900 tons of celery, 7 245 tons of cabbage and 1 046 tons of lettuce were exported to the United States, representing respectively 26%, 12%, 11% and 3% of Québec production.

PRODUCTION

In 1988, the volume of Canadian vegetable production was an estimated 1.8 million tons. Ontario production is the largest with a volume of almost 1.2 million tons, followed by Québec with a volume of 408 000 tons.

Four vegetables account for 54% of total production in terms of value. These vegetables include carrots (15%), cabbage (12%), lettuce (13.7%) and sweet corn (13.9%)

Just over 3 000 farms involved in vegetable horticulture amassed cash receipts worth $106 million in 1988.

ECONOMIC CONDITIONS

Consumers are increasingly concerned with health and proper nutrition. Vegetables are an important part of a healthy diet, and for this reason, demand for vegetables should continue to grow. However, the safety of vegetables will continue to be a major concern over the next decade. Market gardeners face a monumental challenge since they must produce safe foods products by reducing the use of pesticides, knowing full well that alternative methods of crop protection are not available in the immediate future.

The profile of consumers is changing quite quickly in terms of a new lifestyle. Consumers like to buy quality products, and have little time to devote to food preparation; moreover, there are a fewer number of persons per household and consumers are allotting a larger portion of their food budget for restaurant meals. Accordingly, processors should adapt to these changes.

SECTOR: VEGETABLES

STATISTICS	1986	1987	1988	1989	1989/1988 - % -
AREA HARVESTED (hectares)					
Asparagus	376	370	360	365	1.4
Carrots - fresh	2 328	2 931	2 995	2 637	-12.0
- for processing	345	369	353	331	-6.2
Celery	314	364	366	389	6.3
Cabbage	1 939	1 959	2 116	2 030	-4.1
Cauliflower	716	764	725	796	9.8
Cucumber - fresh	653	627	676	763	12.9
- for processing	431	652	506	714	41.1
Beans - fresh	601	603	735	732	-0.4
- for processing	2 476	3 042	3 106	2 813	-9.4
Lettuce	1 273	1 352	1 476	1 535	4.0
Corn - fresh	5 147	5 409	5 476	5 811	6.1
- for processing	3 291	4 369	4 676	4 704	0.6
Onions	925	935	959	1 024	6.8
Peppers	450	471	466	471	1.1
Tomatoes - fresh	992	1 187	1 252	1 155	-7.7
- for processing	197	223	281	313	11.4
Total (other vegetables included)					
- total fresh	17 149	18 422	19 234	20 227	5.2
- total for processing	9 258	11 799	12 610	12 721	0.9
- total all vegetables	26 347	30 211	31 844	32 948	3.5
MARKETED PRODUCTION (tons)					
Asparagus	496	349	379	550	45.1
Carrots - fresh (1)	53 958	81 381	71 924	93 000	29.3
- for processing	11 187	11 935	11 447	11 129	-2.8
Celery	8 447	10 077	15 319	17 364	13.3
Cabbage (1)	51 192	58 442	61 975	67 000	8.1
Cauliflower	8 925	9 020	9 417	11 703	24.3
Cucumber - fresh	7 690	6 553	7 794	9 614	23.4
- for processing	8 189	11 843	11 229	12 294	9.5
Beans - fresh	2 073	1 948	2 500	3 222	28.9
- for processing	13 274	18 462	20 701	21 273	2.8
Lettuce	20 867	22 389	32 255	34 132	5.8
Corn - fresh	24 914	25 906	26 682	30 339	13.7
- for processing	36 171	49 881	50 605	57 795	14.2
Onions (1)	20 190	29 975	23 117	37 000	60.1
Peppers	3 461	4 317	5 456	5 996	9.9
Tomatoes - fresh	6 691	12 304	14 739	13 719	-6.9
- for processing	1 793	3 589	4 499	8 482	88.5
Total (other vegetables included)					
- total fresh	229 384	288 451	299 018	N.D.	-
- total for processing	80 438	105 645	109 861	125 131	13.9
- total all vegetables	309 822	394 096	408 879	N.D.	-
PRODUCTION VALUE ($'000)					
Asparagus	1 186	807	871	1 257	44.3
Carrots - fresh	13 487	16 744	14 907	N.D.	-
- for processing	972	1 018	1 096	1 019	-7.0
Celery	4 849	3 551	4 989	5 399	8.2
Cabbage	9 710	12 656	13 029	N.D.	-
Cauliflower	4 438	4 934	5 054	6 035	19.4
Cucumber - fresh	2 745	2 309	2 967	3 522	18.7
- for processing	1 693	2 625	1 772	2 706	52.7
Beans - fresh	2 062	1 839	1 994	2 861	43.5
- for processing	2 762	3 648	4 500	4 956	10.1
Lettuce	9 930	11 746	14 677	15 545	5.9
Corn - fresh	9 385	8 164	10 434	11 337	8.7
- for processing	3 023	4 221	4 422	5 251	18.7
Onions	5 478	7 244	4 369	N.D.	-
Peppers	2 040	2 899	3 007	3 421	13.8
Tomatoes - fresh	4 645	5 742	7 105	7 666	7.9
- for processing	233	427	575	978	70.1
Total (other vegetables included)					
- total fresh	75 169	84 917	90 223	N.D.	-
- total for processing	12 275	15 303	16 552	20 673	24.9
- total all vegetables	86 714	99 517	106 775	N.D.	-

(1) Estimated production based on total production harvested.

Sources: 9, 10, 32.

FRUITS

MARKET

In 1988, Québec's main fruit productions included apples, strawberries, blueberries and raspberries, representing an estimated market of 178 000 tons, 116 000 of which are consumed in their fresh state.

Total demand for apples was 154 000 tons, 98 000 fresh apples. The apple market includes a good number of varieties. Demand is growing for some varieties such as Granny Smith, red Delicious and yellow Delicious. This increased demand is part of the development strategy of producer countries. New Zealand, whose international trade is very successful, supports development of its apple industry by developing new varieties such as Royal Gala and Fuji.

In 1988, total Québec demand for strawberries was an estimated 17 000 tons. Over the last fifteen years, this market has increased 50%. Demand for blueberries and raspberries totalled 3 100 tons and 3 700 tons respectively.

PRODUCTION

In 1989, apple production in Québec was estimated at 89 272 tons, up 5.7% over 1988. Canadian production was approximately 437 000 tons, down 3% from 451 000 tons produced in 1988. Americans had a good season; their apple production was 4.48 million tons, rising 8% compared to 1988.

Over the last three years, blueberry production in the province largely surpassed consumption. In 1989, blueberry production totalled 7 700 tons, unchanged from the 1988 crop. In 1989, the canadian production was 26 000 tons, a slight decrease compared to 1988. The situation was the same in the United States for the harvest of wild blueberries. American production of cultivated blueberries, which totalled 67 000 tons, exceeded 1988 production.

In 1989, cash receipts attributed to the fruit production industry totalled $49 million. For 1 472 farms in 1986, fruit production was their primary source of income.

Over the last few years, there has been a development in small-scale production of alcoholic beverages using fruit as a base. Currently, 30 farm producers hold permits for small-scale production of wine, cider, hydromel, berry-based wine and mistelle-based wine. In 1989, the 10 small-scale producers who held permits to produce wine, cultivated 247 000 wine-grape plants over a 60 hectare area. Small-scale wine production on farms was an estimated 170 000 bottles containing 750 ml.

ECONOMIC CONDITIONS

In 1989, despite a slight drop in production of early apples, the availability of early varieties remained high with 12 078 tons. This high proportion of early apples (13.5%) compared to the total crop is attributed, in part, to the production of new varieties such as Vista Bella, Jersey Mac and Paula-red. Melba and Lobo varieties are largely affected by falling prices due to a market surplus.

Quality and safety of fruits is still an important concern. Producers must modify some of their growing practises in order to meet consumer demands. The use of chemicals is a growing subject of controversy; the growth regulator "ALAR" is but one example.

Finally, during 1990, Canadian apple growers expressed the need to create a national apple marketing agency to better regulate apple marketing in Canada.

SECTOR: FRUITS

STATISTICS	1986	1987	1988	1989	1989/1988 - % -
AREA HARVESTED (hectares)					
Strawberries	1 984	2 036	1 992	2 054	3.1
Rasberries	710	866	874	873	-0.1
PRODUCTION (tons)					
Apples	57 248	76 204	84 464	89 272	5.7
Strawberries	8 100	8 840	8 710	9 321	7.0
Rasberries	900	1 280	1 308	1 250	-4.4
Blueberries	460	8 980	7 711	6 378	-17.3
FARM VALUE ($'000)					
Apples	17 571	17 944	20 900	N.D.	-
Strawberries	11 202	12 718	13 639	15 846	16.2
Rasberries	3 386	4 082	4 499	4 524	0.6
Blueberries	435	10 586	10 434	8 979	-13.9
FARM AVERAGE PRICE ($/ton)					
Apples	306.93	253.47	247.44	N.D.	-
Strawberries	1 383	1 439	1 566	1 700	8.6
Rasberries	3 527	3 189	3 440	3 619	5.2
APPLE SALES					
Fresh market:					
- Volume (tons)	26 191	30 482	47 807	N.D.	-
- Value ($'000)	13 744	14 032	17 340	N.D.	-
To processors:					
- Volume (tons)	31 057	45 722	36 657	N.D.	-
- Value ($'000)	3 827	3 912	3 560	N.D.	-
TRADE					
Fresh apple imports					
United States					
- Volume (tons)	8 461	10 275	9 483	N.D.	-
- Value ($'000)	4 258	4 768	5 936	N.D.	-
Chili					
- Volume (tons)	2 569	-	4 994	N.D.	-
- Value ($'000)	3 226	-	4 355	N.D.	-
New Zeland					
- Volume (tons)	6 669	856	3 534	N.D.	-
- Value ($'000)	4 480	1 060	3 781	N.D.	-
Argentina					
- Volume (tons)	640	-	112	N.D.	-
- Value ($'000)	359	-	98	N.D.	-
Total (all countries)					
- Volume (tons)	31 058	23 086	18 143	N.D.	-
- Value ($'000)	28 607	17 934	14 180	N.D.	-
Fresh apple exports					
United States					
- Volume (tons)	4 229	2 997	2 194	N.D.	-
- Value ($'000)	1 847	526	691	N.D.	-
United Kingdom					
- Volume (tons)	170	355	113	N.D.	-
- Value ($'000)	135	294	100	N.D.	-
Total (all countries)					
- Volume (tons)	4 416	3 370	2 364	N.D.	-
- Value ($'000)	2 001	838	854	N.D.	-
CASH RECEIPTS ($'000)	41 428	45 113	46 223	49 585	7.3

Sources: 9, 11, 75.

POTATOES

MARKET

The Fédération des producteurs de pommes de terre du Québec markets table potatoes through its selling agency, Pomexpan Inc.. Since 1988, after the takeover by Pomexpan Inc. of Les Patates Québécoises Inc., the Fédération has been experiencing financial difficulties. Due to the demobilization of producers, the financial difficulties of Pomexpan Inc. have deteriorated to the point where in March 1990, the National Bank placed Les Patates Québécoises in the hands of a trustee.

During its last general meeting, in July 1990, the Fédération indicated that its priorities over the next months will be to consolidate its financial situation, to reestablish confidence and equity among potato producers and finally to work in applying centralized selling agencies for the table, seed, processing and pre-peeled sectors.

Seed potatoes are marketed by Proplant Inc.. In the long-term, Québec and Canada must overcome a number of phytosanitary problems to hold their ground on the international tuber market.

As regards marketing potatoes for production of potato chips, producers directly negotiate their conditions for marketing with the four companies in question. However, consumption of instant microwaveable meals is contributing to the growth in potato consumption.

Québec exports small quantities of table potatoes and seed potatoes, while imports are more diversified: table, seed, frozen, mashed, dehydrated and canned.

PRODUCTION

Québec ranks third among Canadian provinces, after Prince Edward Island and New Brunswick, in terms of quantities of potatoes marketed. In 1988, 769 producers registered with the Fédération des producteurs de pommes de terre du Québec devoted 63% of their production to the table market, 7% to pre-peeling, 23% to processing (mainly potato chip production) and finally 6% to seed potatoes.

ECONOMIC CONDITIONS

From one year to another, prices change radically due mainly to the availability of potatoes in eastern Canada and in the northeast United States. These prices are also influenced by the level of stocks during one marketing season.

The price stabilization plan protects producers against market fluctuations. The creation of the Canadian Potato Marketing Agency, which has been the subject of negotiations for several years, should encourage better planning and production at the national level and protect producers to some degree.

Over the next several years, Québec service-providers should concentrate on finding ways to improve the quality of our product to make it more attractive to consumers.

SECTOR: POTATOES

STATISTICS	1986	1987	1988	1989	1989/1988 - % -
ACREAGE					
Cultivated acreage (hectares)					
Québec	17 269	18 008	17 685	17 400	-1.6
Prince Edward Island	25 988	27 114	27 519	27 500	-0.1
New Brunswick	19 613	20 437	19 020	19 300	1.5
Canada	111 527	115 578	112 260	112 100	-0.1
PRODUCTION (tons)					
Québec	368 506	410 010	385 017	360 023	-6.5
Prince Edward Island	801 060	724 492	820 564	817 389	-0.4
New Brunswick	517 060	662 394	533 121	520 371	-2.4
Canada	2 761 342	3 032 868	2 778 080	2 754 130	-0.9
YIELD PER HECTARE (tons/hectare)					
Québec	21.3	22.8	21.8	20.7	-5.0
Prince Edward Island	30.8	27.1	30.0	29.7	-1.0
New Brunswick	26.5	33.1	29.1	27.0	-7.2
Canada	25.3	26.6	25.0	24.6	-1.6
MARKETED PRODUCTION (tons)					
Québec	312 700	355 500	340 700	N.D.	-
UTILIZATION (QUÉBEC)					
Seed (tons)	14 604	14 635	17 374	N.D.	-
Processing (tons) (1)	100 875	101 900	106 177	N.D.	-
Table (tons)	219 851	221 788	231 406	N.D.	-
TOTAL CONSUMPTION ('000 tons)					
White potatoes	732.8	662.3	648.1	N.D.	-
SELF-SUFFICIENCY RATIO (%)					
Québec	43.8	48.90	52.00	N.D.	-
AVERAGE FARM PRICE ($/ton)					
Québec	163.36	130.51	174.38	N.D.	-
Prince Edward Island	163.14	110.01	190.92	N.D.	-
New Brunswick	149.69	102.07	164.46	N.D.	-
Canada	150.79	121.47	171.96	N.D.	-
CASH RECEIPTS ($'000)					
Québec	45 146	50 152	49 148	60 999	24.1
Prince Edward Island	57 270	80 801	63 125	119 046	88.6
New Brunswick	42 796	52 813	54 000	75 585	40.0
Canada	285 785	344 629	340 452	423 483	24.4
TRADE					
Imports ($'000)					
Consumption potatoes	6 035	10 528	5 641	N.D.	-
Seed potatoes	11	16	27.6	N.D.	-
Exports ($'000)					
Consumption potatoes	641	661	755	N.D.	-
Seed potatoes	18	10	56	N.D.	-
INCOME STABILISATION SCHEME (1)					
Total insured acreage (hectares)	14 080	10 288	11 382	10 525	-7.5
Total payment ($'000)	25 917.5	0.0	9 729.9	0.0	-

(1) Data refer to the marketing year, as given by RAAQ. For example, 1986 means 1985-1986.

Sources: 3, 7, 12, 16, 28, 29, 37, 38, 70, 75.

MAPLE PRODUCTS

MARKET

Québec's total market is an estimated 266 000 tons. It is interesting to note that total consumption of sugar is relatively steady despite the drop in household purchases of sugar. From 1982-1986 total consumption rose from 264 000 to 268 700 tons; but over this same period, consumer purchases of sugar dropped 1.66 kg/person from 10.14 to 8.48 kg/person. This trend reveals that Québec consumers have modified their diet by substituting refined sugar with sugar-based products.

Maple syrup consumption in Québec has also fluctuated. Over the period from 1984 through 1988 average consumption was 1 500 tons, up from 800 tons in 1986 to 2 300 tons in 1988. This fluctuation in consumption is directly related to variations in productions and prices. Marketing experts estimate that consumers are more aware of the price when they purchase a product they deem non-essential to nutritional intake, such as sugar.

Finally, note that maple syrup consumption in Québec represents only 6/10 of 1% of total sugar consumption.

PRODUCTION

In 1989, cash receipts of Québec's maple products industry totalled $56.6 million, that is, 1.5% of total cash receipts.

In 1990, production is expected to be as good as last year. Experts estimate that production for 1990 should approach 14 200 kl.

According to farm registration records at the Ministère, in 1987, 7 643 farms declared they had tapped trees.

ECONOMIC SITUATION

For the third consecutive year, the abundant production of maple syrup has placed this industry in a position where there is now a glut on the market. It is estimated that in Québec 23 600 kl is divided in the following manner:

- Accumulated stocks in Québec: 9 400 kl
- Production for 1990 in Québec 14 200 kl

On the world market in 1990, supply was an estimated 28 000 kl:

- Québec supply: 23 600 kl
- Production in other provinces: 1 000 kl
- American production in 1990: 3 400 kl

Because the world market for maple syrup is estimated at 17 900 kl, supply largely surpasses demand. It is therefore in the producers' best interests to continue their cooperative effort to better organize marketing.

Experts maintain that maple syrup can be considered a "top-of-the-line" product, natural, with a unique flavour that is superior. Hence, there is every reason to promote its "natural" image. Experts point out, however, that efforts to develop the market must be supported by regular purchases of maple syrup despite production which was, until now, cyclical, creating sometimes considerable gaps from one year to the next.

SECTOR: MAPLE SYRUP INDUSTRY

STATISTICS	1986	1987	1988	1989	1989/1988 - % -
Number of cuts ('000)	14 996	15 297	16 689	16 496	-1.2
PRODUCTION					
Maple syrup (kl)	9 010	7 787	12 898	13 493	4.6
Farm made maple sugar ('000 kg)	95	101	191	265	38.7
Farm made maple toffee ('000 kg)	106	71	116	158	36.2
Farm made maple butter ('000 kg)	70	45	76	98	28.9
Total production (sirup equivalent) (kl)	9 275	8 000	13 274	14 005	5.5
Yield per cut (litre/cut)	0.62	0.52	0.84	N.D.	-
FARM VALUE ($'000)					
Maple syrup	55 906	50 516	83 596	N.D.	-
Farm made maple sugar	786	1 130	2 081	2 563	23.2
Farm made maple toffee	803	689	1 254	1 537	22.6
Farm made maple butter	599	506	879	1 038	18.1
Farm consumption	1 840	2 177	3 315	2 821	-14.9
Total farm value	58 094	52 841	87 810	N.D.	-
PRODUCTION SELLING (kl)					
Direct sales from the farm	2 040	1 704	2 397	3 030	26.4
Whole sales:					
- Classified	6 915	6 026	10 514	9 119	-13.3
- Non-classified	-	-	878	1 494	70.2
Farm consumption	320	270	363	362	-0.3
EXPORTS (other provinces included)					
Maple syrup					
West Germany					
- Volume (kl)	559.0	359.5	225.4	N.D.	-
- Value ($'000)	4 438.0	3 118.0	1 350.0	N.D.	-
United States					
- Volume (kl)	5 485.0	4 640.0	3 595.1	N.D.	-
- Value ($'000)	42 132.0	34 746.0	22 153.0	N.D.	-
Japan					
- Volume (kl)	155.9	132.0	121.2	N.D.	-
- Value ($'000)	1 198.0	1 074.0	842.0	N.D.	-
Maple sugar					
United States					
- Volume (tons)	22.2	38.0	551.0	N.D.	-
- Value ($'000)	211.0	253.0	2 509.0	N.D.	-
Sweden					
- Volume (tons)	138.5	89.0	71.0	N.D.	-
- Value ($'000)	874.0	812.0	575.0	N.D.	-
Switzerland					
- Volume (tons)	-	-	64.0		-
- Value ($'000)	-	-	276.0		-
TOTAL EXPORT VALUE (all destinations)	55 309	44 744	41 888	30 536	-27.1

Sources: 9, 15, 20, 55.

ORNAMENTAL HORTICULTURE

MARKET

According to the Fédération interdisciplinaire de l'horticulture ornementale du Québec (FIHOQ), the ornamental horticulture industry on the whole has been developing at a rate of approximately 12% per year since 1983.

Statistics from an economic study, carried out by MAPAQ in 1985, are the only data available. In 1983-84, the value of Québec's Total production of ornamental horticulture products (tree nursery, greenhouse and sod farms) in Québec was worth $209.0 million while the value of consumption of goods and services was $420.0 million. Self-sufficiency rose to 53.8%. The FIHOQ currently estimates that consumption of ornamental horticulture goods and services will total $650 million and self-sufficiency will remain unchanged. The market of wholesale tree nursery products is worth $200 million according to experts.

Also according to experts, the Québec tree nursery market should grow 10% each year. Moreover, 75% of Québec's wholesale market in tree nursery products would be occupied by Ontario, British Columbia, the United States and Europe.

As regards sod farms and other ornamental horticulture products, they would cover respectively 100% and 50% of the Québec market.

PRODUCTION

In 1988, there were 75 Québec companies working in the sector of tree nurseries and sod farms over a total area of 8 836 hectares. This production provided 207 year-round jobs and 1 078 part-time jobs for total wages of $10.2 million (Statistics Canada).

However, there are an estimated 125 tree nurseries in Québec, approximately 10 of which represent 80% of Québec's production.

ECONOMIC CONDITIONS

The ornamental horticulture industry in Québec is relatively young but it has been developing at a fast pace over the last fifteen years. The public has become more conscious of the quality of the environment and the important part that plants play in our lives. The industry has been somewhat shaken with this evolution and must adjust to the demands related to this growth.

To meet the demand from Québec consumers, the province must develop its industry in order to compete with the products of its competitors.

For this reason, service-providers founded, on November 14, 1989, the Institut québécois du développement de l'horticulture ornementale (I.Q.D.H.O.). This non-profit corporation has three main objectives:

- To contribute to the development of the ornamental horticulture industry;
- To ensure technical and financial services;
- To promote research.

In 1990, marketing of ornamental products in Québec will become more dynamic. Organizations such as the Institut, FIHOQ, HORTISER and MAPAQ are uniting to seek out and obtain new markets. This joint effort will improve the growth of the ornamental sector.

SECTOR: NURSERY AND SOD GROWING INDUSTRY

STATISTICS	1985	1986	1987	1988	1988/1987 - % -
NUMBER OF BUSINESS					
Québec	144	87	78	75	-3.8
Ontario	233	140	139	143	2.9
Canada	624	368	342	364	6.4
ACREAGE (hectares)					
Québec	6 709	6 783	8 251	8 836	7.1
Ontario	13 417	15 439	18 252	20 118	10.2
Canada	28 882	30 548	34 452	38 777	12.6
VALUE OF SALES					
Nurseries ($'000)					
Stock sold retail	7 887.7	9 546.4	8 146.4	7 599.3	-6.7
Stock sold to fruit growers	1 989.5	1 279.0	1 253.4	N.D.	-
Stock sold to landscape contractors	2 442.8	3 185.5	2 041.0	2 783.3	36.4
Stock sold to garden centers	4 406.6	5 242.7	4 091.0	4 784.4	16.9
Stock sold to mass merchandisers	733.9	740.9	1 346.0	N.D.	-
Stock sold to other growers of nursery stock	707.2	704.7	2 442.3	4 214.2	72.6
Total sales	18 167.7	20 669.2	19 320.0	20 318.5	5.2
Sod growing industry					
Sales ($'000)	12 251.3	14 008.0	15 380.9	23 048.3	49.9
Acreage of sod grown and sold (hectares)	1 908	2 045	2 914	3 135	7.6
LABOUR					
Number of full-time employees					
Québec	654	386	201	270	34.3
Ontario	1 466	1 115	1 362	1 717	26.1
Canada	2 875	2 105	2 228	2 894	29.9
Number of part-time employees					
Québec	856	1 294	1 006	1 078	7.2
Ontario	2 373	2 843	3 053	3 272	7.2
Canada	5 069	5 843	5 768	6 701	16.2
Gross yearly payroll ($'000)					
Québec	8 697.4	8 058.1	7 425.5	10 214.1	37.6
Ontario	30 045.0	32 626.2	39 279.0	47 785.8	21.7
Canada	56 190.5	57 465.3	67 578.7	82 741.1	22.4

Source: 53.

GREENHOUSE CROPS AND MUSHROOMS

MARKET

The Québec market for greenhouse vegetables is the subject of stiff competition between suppliers from Québec, Canada and the United States. In spring 1990, the market glut of greenhouse tomatoes forced prices to fall below production costs.

Demand for ornamental greenhouse products is strong and remains steady; it's a growing market. Direct sales to the public represented more than 45% of the total and sales to Canadian wholesalers followed with 21%. Québec's supply in annual flowers met 100% of demand and 30% for green plants (inventory of local and regional office of MAPAQ, 1988).

In 1988, consumption of fresh and canned (F&C) mushrooms totalled 17 400 tons. Since 1973, total mushroom (F&C) consumption has increased 6 700 tons where previously it was 10 700 tons. Over this 15-year period, total consumption of fresh mushrooms accounted for the largest part of market growth, from 4 500 tons to 11 800 tons during the period from 1973 through 1988. In 1973, consumption of fresh mushrooms represented 42% of total mushroom (F&C) consumption while it was 68% in 1988. Consumption of fresh mushrooms has grown since 1985 when total consumption of canned mushrooms peaked at 8 900 tons only to fall to 5 600 tons in 1988. Consumption of fresh mushrooms has grown from 9 300 tons to 11 800 tons from 1985 through 1988 respectively.

PRODUCTION

The industry of vegetable and floral crops, in 1988, included some 286 companies and covered a greenhouse area of 766 000 sq. meters (Statistics Canada). According to experts, this data does not reflect the true reality of this sector. The inventory carried out by MAPAQ in 1988 indicates that there were between 1 000 and 1 200 companies operating in this sector in Québec, more than half of which were located in the Montreal region. This inventory also indicated that more than 50% of companies were devoted to ornamental production (particularly annual flowers) and 33% to plant production (particularly tomatoes).

In 1989, mushroom production in Québec, totalling 2 267 tons, represented 4% of Canadian production (52 200 tons). In 1987, 25 companies declared that they produced mushrooms over a total area of 23 800 sq. meters. Regions north of Montreal, St-Hyacinthe and Québec comprised 81% of total production area, that is, 19 300 square meters, cultivated by 15 companies. The St-Hyacinthe region alone accounted for 15% of Québec production, controlled by three companies. Two factors limit development of this specialized crop. It requires a large number of qualified workers trained in composting techniques.

ECONOMIC CONDITIONS

In 1989, the total area devoted to greenhouse tomato crops in Québec increased by approximately 5 hectares, which contributed to increasing the supply of tomatoes, despite a small number of new start-up projects. Consequently, in 1990-1991, production of greenhouse tomatoes will increase since yields from projects will improve and also because at least 5 additional hectares will be in production.

For this reason, greenhouse producers created the Agence centrale de commercialisation des fruits et légumes de serre du Québec Inc. (A.C.C.), to promote organized marketing of greenhouse products. In the area of ornamental greenhouse plants, producers created an collective marketing agency known as "Hortiser". This agency will promote regular marketing of production on a yearly basis and a greater diversity of products available.

The development of Québec mushroom production should be assured by family-run businesses. A number of these companies will use the services of a composting centre. However, this type of development would be better off if supported by a collective group of suppliers in order to ensure wholesalers regular volumes.

SECTOR: GREENHOUSE INDUSTRY AND MUSHROOMS

STATISTICS	1986	1987	1988	1989	1989/1988 - % -
GRENNHOUSE INDUSTRY					
NUMBER OF ESTABLISHMENTS					
Total	504	300	272	286	5.1
Greenhouse fabrics					
- Glass	101	46	37	44	18.9
- Plastic	473	293	270	284	5.2
ACREAGE (square meters)					
Total	673 415	656 616	733 490	766 019	4.4
Acreage under glass	68 261	40 079	41 588	39 911	-4.0
Acreage under plastic	605 154	616 538	691 902	726 108	4.9
GREENHOUSE VEGETABLES (1)					
Production					
- Tomatoes (kg)	1 250 572	1 110 874	1 721 999	1 540 708	-10.5
- Cucumbers (dozen)	167 992	160 269	198 344	197 229	-0.6
Farm value ($'000)					
- Tomatoes	2 694.5	2 705.5	4 163.3	3 602.7	-13.5
- Cucumbers	902.4	973.3	1 428.0	1 361.8	-4.6
- Other vegetables	305.0	534.3	167.2	111.9	-33.1
- Total	3 901.9	4 213.1	5 758.5	5 076.4	-11.8
ORNEMENTAL FLOWERS AND PLANT SALES					
Sales value ($'000)					
- To retail florists	8 728.3	7 008.3	7 481.2	7 655.5	2.3
- To domestic wholesalers	5 393.5	6 699.6	10 439.2	9 755.2	-6.6
- To mass market chain stores	3 767.6	4 798.1	3 149.8	3 861.1	22.6
- To other greenhouse	1 565.4	1 207.1	2 365.4	2 189.3	-7.4
- Direct sales to the public	16 533.9	13 274.0	12 915.1	20 127.9	55.8
- Exports sales	98.3	638.2	508.7	1 196.2	135.1
- Total sales	36 087.0	33 625.3	36 859.3	44 785.2	21.5
LABOUR					
Number of employees	1 817	1 618	1 742	1 787	2.6
Gross yearly payroll ($'000)	9 664.7	8 949.3	9 963.5	11 623.4	16.7
MUSHROOMS (QUÉBEC AND MARITIMES)					
ACREAGE (square meters)					
Cultivated	30.2	27.5	24.0	26.4	10.0
Harvested	140	131	123	133	8.1
SALES VOLUME ('000 kilograms)					
Fresh mushrooms	2 077	1 165	2 712	2 267	-16.4
SALES VALUE ($'000)					
Fresh mushrooms	8 017	3 783	9 267	8 282	-10.6
LABOUR					
Number of employees	201	252	262	266	1.5
Gross yearly payroll ($'000)	3 974	2 066	4 172	4 406	5.6

(1) Note: Industry service-providers consider that figures from Statistics Canada under estimate the volume of production.

	1989		
	Acreage square meters	Production '000	Market '000
Tomatoes	550 000	9 000 kg	18 000 kg
Cucumbers	180 000	423 dz	1 100 dz
Lettuce	70 000	1 600 kg	N.D.

Sources: 34, 36, 64, 68.

GRAIN

MARKET

The Québec grain market represents a volume of 4.4 million tons, 875 000 tons of which is for human consumption (flour mills, breweries, distilleries) and 3.5 million tons for animal consumption.

Québec production totalled 2.6 million tons, and this meets only 59% of overall demand, rendering Québec a net importer of grain. With an estimated production of wheat for human consumption of 73 000 tons (1989), Québec must import a good deal of its grain for human consumption. However, 72% of animal consumption needs are met through Québec grain production.

At the Canadian level, the grain industry depends largely on exports since 50% of production is sold outside of Canada (75% in wheat).

PRODUCTION

In 1989, Canadian production was an estimated 53.0 million tons, up 26% compared to 1988, which was marked by widespread drought. In terms of volume, 78% of grain and oilseed production is concentrated in the West, 16% in Ontario and 5% in Québec.

In Québec, 630 000 hectares are devoted to grain and oilseed crops. Québec production, in 1989, totalled 2.6 million tons. Grain corn is the main crop with 1.6 million tons, followed by barley with 485 000 tons. As a result of exhaustive efforts, soybean crops are developing rapidly and production totalled 43 000 tons in 1989, four times that of 1986.

Québec production in 1988 was worth an estimated $395 million. Cash receipts, which represent marketed production, totalled $237 million for the same year. An estimated 60% of production is marketed.

Some 24 000 farms grow grain and oilseed crops (1987 statistics). Of this total, there are approximately 4 000 farms specialized in grain (main source of income).

ECONOMIC CONDITIONS

The last several years were marked by low grain prices due to a surplus production capacity at the international level and a trade war between the United States and the European Economic Community. Following steadier prices in 1988-89, due to the drought, North American prices for corn and barley should fall again over 1989-90 due to increased production, while wheat prices should remain steady. During 1990-91, world wheat prices are expected to fall again since stocks will be renewed. Prices for secondary grain on the North American market should increase over this year, reflecting a reduced supply.

As part of the present review process of Canadian farm policies, Québec, in cooperation with the federal government, is preparing a proposal for a new income protection program for producers of grain and oilseeds.

SECTOR: GRAIN AND OILSEEDS

STATISTICS	1986	1987	1988	1989	1989/1988 - % -
ACREAGE ('000 hectares)					
Corn for grain	234.4	228.0	240.0	253.0	5.4
Wheat	53.6	65.0	66.8	54.8	-18.0
Barley	172.0	174.0	170.0	162.0	-4.7
Oats	101.0	103.0	135.0	140.0	3.7
Soybean	4.4	8.0	15.0	17.5	16.7
Total (grain and oilseed)	595.9	606.0	654.8	655.3	0.1
PRODUCTION ('000 tons)					
Corn for grain					
Québec	1 130.0	1 410.0	1 500.0	1 570.0	4.7
Canada	5 911.5	7 014.8	5 369.2	5 806.4	8.1
Wheat					
Québec	166.0	183.0	175.5	159.0	-9.4
Canada	31 377.9	25 950.2	15 994.9	23 997.7	50.0
Barley					
Québec	515.0	457.0	460.0	485.0	5.4
Canada	14 568.6	13 957.1	10 212.0	12 079.4	18.3
Oats					
Québec	224.0	232.0	284.0	295.0	3.9
Canada	3 251.1	2 995.2	2 993.0	3 660.2	22.3
Soybeans					
Québec	10.0	17.8	34.4	43.0	25.0
Canada	960.0	1 266.5	1 152.6	1 160.2	0.7
Total (other grains included)					
Québec	2 128.0	2 374.8	2 528.9	2 627.0	3.9
Canada	62 574.5	57 339.1	41 536.4	N.D.	-
PRODUCTION VALUE ($'000)					
Corn for grain	122 227	166 493	229 080	N.D.	-
Wheat, barley, oats	104 967	110 560	155 547	N.D.	-
Soybeans	2 270	4 660	10 734	N.D.	-
Total (other grains included)	229 464	281 713	395 361	N.D.	-
PRICE ($/ton - Montreal)					
Corn for grain	123.60	124.34	168.23	136.00	-19.2
Wheat	124.10	133.20	180.34	170.00	-5.7
Barley	114.67	108.92	149.14	132.00	-11.5
Oats	125.94	147.10	193.88	120.00	-38.1
Soybeans (Chatham, Ontario)	232.00	276.00	316.00	N.D.	-
QUÉBEC INCOME STABILISATION SCHEME (1):					
Total payment ($'000)					
Corn for grain	57 531	42 136	31 211	78 881	-
Wheat, barley, oats	46 930	25 680	23 140	45 020	-
Total	104 461	67 816	54 351	123 901	-
SELF-SUFFICIENCY RATIO (prod./cons) (%)					
Corn for grain	64	76	81	N.D.	-
Wheat	43	40	45	N.D.	-
Barley	72	67	64	N.D.	-
Total (feed grain)	64	72	74	N.D.	-
TRADE ('000 tons)					
Imports (interprovincial and international)					
Québec					
Corn for grain	649.1	439.4	N.D.	N.D.	-
Wheat	224.4	272.1	N.D.	N.D.	-
Barley	196.8	224.4	N.D.	N.D.	-
Total (grain and oilseed)	1 197.5	965.4	N.D.	N.D.	-
Exports					
Canada					
Corn for grain	143	409	50	201	302.0
Wheat	20 782	23 519	12 300	11 212	-8.8
Barley	6 718	4 594	2 750	3 885	41.3
Total (grain and oilseed)	31 064	31 589	18 505	N.D.	-

(1) Values refer to the marketing year, as given by RAAQ. For example, 1986 means 1985-1986.
Sources: 2, 12, 16, 47, 48, 75.

TOBACCO

MARKET

The tobacco sector is segmented into three main markets: light tobacco, cigar tobacco and pipe tobacco.

Cigarette consumption has fallen sharply over the last several years. From 1981 through 1989, Canadian consumption fell from 66.5 billion to 47.4 billion cigarettes, a 30% decrease. Consumption in Québec has followed the same trend. In 1981, it was an estimated 18.8 billion cigarettes and in 1989, it was 12.3 billion, a decline of 35%.

PRODUCTION

The decline in demand reverberates back to production. In 1984, Québec manufacturers warned producers that they would not purchase more than 6 800 tonnes of light tobacco. In 1990, the quota for light tobacco is 4 927 tons, comprised of a basic quota of 4 482 tons and a reserve of 445 tons.

ECONOMIC CONDITIONS

In the summer of 1987, the federal government introduced a plan to diversify the tobacco industry comprising two programs. Under this plan, producers made full use of the program for diversification of tobacco producing farms. Consequently, the federal government announced in October 1989, that it would maintain this program and would add an additional $2.5 million for farmers who want to abandon tobacco production.

Since it came into effect, 39 tobacco producers producing light tobacco and 76 farms producing pipe and cigar tobacco have participated in the program. In 1986, 124 companies produced light tobacco and 127 companies produced pipe and cigar tobacco.

SECTOR: TOBACCO

STATISTICS	1986	1987	1988	1989	1989/1988 - % -
NUMBER OF FARM					
Light tobacco	124	112	109	96	-11.9
Cigar tobacco	124	83	53	29	-45.3
Pipe tobacco	3	3	3	2	-33.3
ACREAGE (hectares)					
Light tobacco	3 111	2 747	2 599	2 368	-8.9
Cigar tobacco	155.5	118.5	83.2	56.1	-32.6
Pipe tobacco	4.1	5.1	4.9	2.8	-42.9
PRODUCTION (tons)					
Light tobacco	4 578	5 602	4 986	5 295	6.2
Cigar tobacco	244.0	226.0	158.0	109.0	-31.0
Pipe tobacco	6.5	7.2	6.1	4.5	-26.2
AVERAGE YIELD (kg/hectare)					
Light tobacco	1 446	2 137	N.D.	N.D.	-
Cigar tobacco	1 939	1 913	N.D.	N.D.	-
Pipe tobacco	1 577	1 410	N.D.	N.D.	-
AVERAGE PRICE ($/kg)					
Light tobacco	4.05	4.21	4.30	4.50	4.7
Cigar tobacco	2.36	2.79	3.60	3.75	4.2
Pipe tobacco	3.14	3.21	3.52	4.33	23.0
TOBACCO PRODUCTS (CANADA)					
Cigarettes ('000 000)	55 632.6	54 002.8	53 858.0	50 344.2	-6.5
Cigars ('000 000)	283.0	277.6	218.6	231.1	5.7
Manufactured tobacco (tons)					
Fine cut	7 858.1	7 895.0	9 016.2	7 965.1	-11.7
Pipe tobacco	37.7	49.7	25.6	18.5	-27.7
CIGARETTE CONSUMPTION ('000 000)					
Québec	14 164.7	13 531.4	13 347.2	12 300.0	-7.8
Canada	55 437.0	52 613.1	51 053.3	47 400.0	-7.2
VALUE OF SHIPMENTS ($'000)					
Québec	826 900	1 032 400	1 034 500	1 122 500	8.5
Ontario	796 300	849 200	864 300	867 400	0.4
Canada	1 623 200	1 881 600	1 898 900	1 989 900	4.8
CASH RECEIPTS ($'000)					
Québec	18 833	23 261	19 799	23 847	20.4
Ontario	420 563	219 014	178 321	260 037	45.8
Canada	452 487	256 775	212 933	297 367	39.7

Sources: 22, 23, 41, 42, 70, 75, 80.

FODDER CROPS

MARKET

The value of the 7 million tons of forage harvested by Québec producers can be determined only after this foodstuff has been used or fed to dairy and beef herds.

However, Québec ranks first among provinces exporting hay with a total of 29 858 tons in 1987, accounting for almost 55% of Canadian exports. The large majority of these exports went to the United States, especially the states of New England, New Jersey, New York and Pennsylvania; Québec also exports small volumes of hay to Japan and the United Kingdom. Total hay exports were worth $3.4 million in 1987 for an average price of $112/ton exported.

Although it is just beginning to develop in Québec, the industry of dehydrated alfalfa exported 485 tons of this product in 1987, accounting for 0.2% of Canadian exports, in a market that is dominated by western provinces.

PRODUCTION

In 1989, the production of tame hay in Québec totalled 6.23 million tons and approximately 20% of Canadian production, production that is comparable to that of the previous year. At an average price of $90/ton, Québec production was worth $560 million, that is, almost $563/hectare in production. As for fodder corn, which is grown mainly in eastern Canada, Québec production was 1.72 million tons, a fall in production of 11.34% compared to that of 1988.

Crops of hay and fodder corn in Québec covered a total area, by far the largest in Québec, of 1.048 million hectares in 1989, that is, 45% of improved land.

The seasonal yield of tame hay has varied very little over the past four years, remaining steady at 6.29 tons/hectare in 1989. However, the yields of fodder corn was 30.2 tons/hectare, down 12% compared to average yield in 1988.

ECONOMIC CONDITIONS

Production of fodder crops is closely connected to dairy and cattle production. However, there has been an increasing trend in Québec to market dry hay and processed forage, including among others, dehydrated alfalfa.

Fodder crops are beneficial in that they help to maintain and improve soil fertility and conserve natural resources when used in crop rotations, a practice that will be used increasingly by producers of grain, corn, and other annual commercial crops.

The Conseil québécois des plantes fourragères whose Board of Directors is comprised of representatives for producers, training establishments and public and private sectors, and which was founded in 1987 and continues to ensure the promotion and expansion of production, use and marketing of fodder crops in Québec.

SECTOR: FODDER CROPS

STATISTICS	1986	1987	1988	1989	1989/1988 - % -
ACREAGE ('000 hectares)					
Tame hay	974.7	986.0	986.0	991.0	0.5
Fodder corn	61.2	58.0	57.0	57.0	0.0
PRODUCTION ('000 tons)					
Tame hay					
Québec	6 100	6 500	6 160	6 230	1.1
Ontario	7 624	7 711	6 620	7 348	11.0
Canada	30 204	30 840	29 025	30 836	6.2
Fodder corn					
Québec	1 800	2 000	1 940	1 720	-11.3
Ontario	5 444	5 806	4 082	4 445	8.9
Canada	8 357	8 691	6 993	7 222	3.3
YIELD (tons/hectare)					
Tame hay					
Québec	6.3	6.6	6.3	6.3	0.6
Ontario	7.5	7.5	6.4	7.1	10.6
Canada	5.6	5.4	4.9	5.2	6.5
Fodder corn					
Québec	29.4	34.5	34.0	30.2	-11.2
Ontario	28.7	35.8	26.5	29.2	10.2
Canada	28.9	34.7	29.0	30.1	3.8
FARM AVERAGE PRICE ($/ton)					
Tame hay	64.09	75.74	96.51	N.D.	-
PRODUCTION VALUE ($'000)					
Tame hay	390 949	492 310	594 501	N.D.	-
TRADE					
Hay exports					
Québec (tons)	37 455	29 858	N.D.	N.D.	-
($'000)	3 977	3 355	N.D.	N.D.	-
Canada (tons)	79 005	55 076	N.D.	N.D.	-
($'000)	10 141	6 690	N.D.	N.D.	-
UTILIZATION OF FORAGE SEED ('000 kg)					
Leguminous plants	936	1 485	1 409	1 728	22.6
Gramineous plants	939	1 494	1 072	1 476	37.7
Total	1 875	2 979	2 481	3 204	29.1

Sources: 12, 37, 54, 84.

CHAPTER 4
FISHERIES

FISHERIES

MARKET

After some recovery in 1989, the groundfish market has continued to improve over the first six months of 1990. The main products sold on the Boston market included the cod block whose price has increased 23% settling at US$2.00 per pound in mid-June compared to US$1.75 per pound in early January. The price of the five pound filet increased 20% over this period to settle at US$2.10 per pound. These increases are attributed mainly to a smaller supply, subsequent to reduced quotas in producer countries.

As for molluscs and shellfish, the situation is more confusing and more unstable. Increased lobster catches along the Atlantic Coast in 1989, brought prices down and this trend continued into the spring, winter fishing provided an early indication that it would be another year of abundance. The passing of an American law prohibiting imports of small live lobster aggravated the situation and caused prices to collapse. Landed prices were cut in half and there were incredible promotions in Montreal where consumers could buy 20 small lobsters from New Brunswick for $30 and 7 lobsters from the Magdalen Islands for $20.

The snow crab market has steadied slightly since the beginning of the year and prices for frozen crab meat, in five pound packages, rose from US$6.30 per pound to US$6.48 per pound in mid-June (prices were US$5.88 per pound in mid-June 1989); the fixed quota of 7 000 tonnes for mid-shore fishing in the Gulf of St. Lawrence this year limited supply. The shrimp market, however, remains difficult due to competition from farmed shrimp imported from Asia.

PRODUCTION

It is too early to speak of production in terms of species and regions since the fishing season has just started. However, on the whole, quotas for groundfish caught by Québec fishermen remain relatively the same as those in 1989, except for cod in the northern part of the Gulf, but the impact on Québec fishermen will be moderate. In the case of mid-shore crab, the fishing season ended on June 8; considering that the proportion of soft-shell crab was 20%, more than 99% of the quota was complete according to preliminary statistics.

ECONOMIC CONDITIONS

The groundfish market should remain stable as long as prices for replacement products, especially cod filets and the pollack block from Alaska remain relatively steady. The lobster situation will depend on the industry's ability to find new markets for small lobster that is no longer allowed into the United State and consumer response to promotional campaigns. Crab should continue to recover and Japanese demand should improve. As for the shrimp market, there is no indication of any major change.

SECTOR: FISHERIES

STATISTICS		1986	1987	1988	1989	1989/1988 - % -
Number of registered fishermen						
Québec		6 329	6 815	6548	5995	-8.4
Atlantic Coast		60 509	64 464	N.D.	N.D.	-
NUMBER OF FISHING VESSELS						
Under 10,6 meters	Québec	2 197	2 249	2202	2031	-7.8
	Atlantic Coast	21 335	22 194	N.D.	N.D.	-
10,6 to 13,6 meters	Québec	376	380	386	378	-2.1
	Atlantic Coast	6 129	6 285	N.D.	N.D.	-
13,6 to 19,8 meters	Québec	214	214	226	215	-4.9
	Atlantic Coast	1 143	1 135	N.D.	N.D.	-
Over 19,8 meters	Québec	27	28	32	27	-15.6
	Atlantic Coast	338	322	N.D.	N.D.	-
VOLUME OF CATCHES (tons)						
Groundfish	Québec	55 865	63 756	55 724	51 269	-8.0
	Atlantic Coast	775 438	766 325	734 025	678 778	-7.5
Pelagic species	Québec	7 625	9 039	9 707	7 666	-21.0
	Atlantic Coast	293 789	319 441	393 207	346 014	-12.0
Molluscs and shellfish	Québec	26 445	24 365	22 761	22 494	-1.2
	Atlantic Coast	165 524	179 164	199 596	214 370	7.4
Other species	Québec	35	115	39	36	-7.7
	Atlantic Coast	12 797	115	39 870	28 853	-27.6
VALUE OF CATCHES ($'000)						
Groundfish	Québec	28 082	47 068	26 908	26 593	-1.2
	Atlantic Coast	368 162	514 232	372 513	355 785	-4.5
Pelagic species	Québec	4 222	5 006	4 939	4 012	-18.8
	Atlantic Coast	81 207	80 226	98 501	82 261	-16.5
Molluscs and shellfish	Québec	53 558	73 769	67 285	51 832	-23.0
	Atlantic Coast	425 109	517 020	533 230	478 662	-10.2
Other species	Québec	42	444	60	59	-1.7
	Atlantic Coast	4 007	5 340	5 237	3 772	-28.0
Total	Québec	85 903	126 197	99 192	82 496	-16.8
	Atlantic Coast	878 485	1 116 818	1 009 481	920 480	-8.8
FISH PRODUCTS INDUSTRY						
Number of establishments	Québec	39	40	N.D.	N.D.	-
	Atlantic Coast	335	N.D.	N.D.	N.D.	-
Number of employees	Québec	2 205	2 521	N.D.	N.D.	-
	Atlantic Coast	24 338	N.D.	N.D.	N.D.	-
CONSUMPTION (kg per person)						
Fresh or frozen	Québec	6.51	5.93	6.06	N.D.	-
Cured, salted, smoked, pickled	Québec	0.22	0.22	0.22	N.D.	-
Canned	Québec	1.91	1.81	1.70	N.D.	-
Freshwater species	Québec	0.27	0.27	0.27	N.D.	-

Sources: 29, 43, 44, 45, 46, 60.

SECTOR: AQUACULTURE

STATISTICS	1987	1988	1989	1989/1988 - % -
AQUACULTURE PERMITS				
Commercial				
Trout	130	148	153	3.4
Salmon	0	1	1	0.0
Mussels	12	14	23	64.3
Scallops	1	1	5	400.0
Fish farms	N.D.	393	384	-2.3
SALES				
Trout for food (tons)	N.D.	250	260	4.0
Sowing and fish farm (tons)	N.D.	940	940	0.0
Salmon for food (tons)	N.D.	56	30	-46.4
Sowing salmon:				
- Engendering salmon (nb)	N.D.	250	-	-
- Young salmon (nb)	N.D.	13 500	13 500	0.0
Mussels (tons)	N.D.	92	162	76.1
Fish farms:				
- Speckled trout (nb)	N.D.	662 000	617 085	-6.8
- Rainbow trout (nb)	N.D.	143 600	166 998	16.3

Sources: 27, 39.

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LIST OF RESOURCE PERSONNEL

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Si vous désirez obtenir des renseignements complémentaires sur l'un des secteurs, veuillez contacter une des personnes suivantes:

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Aliments et boissons	Normand Morin	Analyse des politiques
Commerce international	Noëlla Jean	Économie des marchés
Production laitière	René Cormier	Économie des marchés
Production bovine	Normand Morin Claude Chartrand	Analyse des politiques Statistique et conjoncture
Production porcine	Lise Thiboutot	Analyse des politiques
Production ovine	Normand Morin Claude Chartrand	Analyse des politiques Statistique et conjoncture
Volaille	Michel Bergevin	Économie des marchés
Oeufs de consommation	Henri-Louis Gagnon	Économie des marchés
Oeufs d'incubation	Pierre Belleau	Syndicat des producteurs d'oeufs d'incubation
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